



# Survey of Case Management Services for Older Adults in Dane County

January 1, 2016 – August 31, 2016



January 2017

# Introduction

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## I. Background

Through contracts with purchase of service (POS) agencies, Dane County Department of Human Services provides publicly-funded case management services for older adults.

Case management is defined as, “The provision of services by providers whose responsibility is to enable clients and when appropriate clients’ families to gain access to and receive a full range of appropriate services in a planned, coordinated, efficient, and effective manner. Case managers are responsible for locating, managing, coordinating, and monitoring all services and informal community supports needed by clients and their families. Services may include, but are not limited to, assessment; case planning, monitoring and review; advocacy; and referral.”<sup>1</sup>

The primary goal of case management services is to provide older adults with the support, resources, and community services that they need to safely remain in their own homes and communities. Case managers assist with the assessment of individual needs and the coordination of a variety of services – from home chore and personal care to assistance with health insurance and prescription drug plans.

Case management services in Dane County are provided through a network of 15 geographically-based senior focal points.

Case management services are funded primarily by Dane County General Purpose Revenue (GPR). A small amount of 2016 funding (\$10,000) came from State Health Insurance Assistance Program (SHIP) funds which are federal dollars from the Centers for Medicare and Medicaid Services (CMS), passed through the Wisconsin Department of Health Services (DHS) to counties to provide outreach to low-income older adults for assistance with issues involving Medicare/Medicaid, enrollment in assistance programs to help off-set the cost of Medicare premiums (like LIS – Low Income Subsidy or Extra Help), and any other issue related to Medicare. In Dane

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<sup>1</sup> *Standard Program Categories*, Department of Health Services (Madison, Wisconsin, 2013), p. 15 available on-line at: <http://www.dhs.wisconsin.gov/hsrs/docs/SPCDEFINITIONS.pdf>

County, these dollars are used to provide this outreach through ten (10) of the senior focal point case management programs.

In order to receive County-funded services, clients must be Dane County residents age 60 and older, live in their own home or apartment or home of a family member, and have an income below 240% of the Federal Poverty level.

The 2016 contracts with purchase-of-service agencies included the requirement to, “Collaborate with DCDHS staff to distribute a satisfaction survey annually for Client-Centered Case Management clients to complete.” The contracts also indicated that the County was to, “Collaborate with agency staff to distribute a satisfaction survey annually for Client-Centered Case Management clients to complete and provide results/findings of the survey by January 10, 2017.”

## **II. Study Purpose**

The purpose of the survey was 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.

## **III. Data Collection**

### Measures

The mail version of the Case Management Survey of the Administration on Aging, Performance Outcome Measures Project (POMP), available at: [http://www.aoa.acl.gov/Program\\_Results/POMP/CaseManagement.aspx](http://www.aoa.acl.gov/Program_Results/POMP/CaseManagement.aspx), as updated in 2008 and available from the Administration for Community Living, Aging Integrated Database (AGID) served as the base instrument. That instrument has been used in looking at performance nationally. Using it for this study allowed for comparison to national and regional data available at <http://www.agid.acl.gov/> from ACL.

The Case Management Survey examines the services that were provided, the recipients’ satisfaction with those services, and the ways they have been helpful.

The 2016 DCDHS version of the survey differed from the ACL survey by:

- Including the program and case manager name in the introduction.
- Not including a question inquiring about the last time that case management services were received.
- Retaining the list of services coordinated, but updated for Dane County from prior versions of the AoA survey.
- Not including the question, “Do you and your case manager work together to decide what services you need?”
- Using the phrasing, “Is your situation better because of your case manager’s help?” rather than the ACL phrasing of “Has your situation improved because of the services your case manager arranges?”
- Retaining the question, “Are you satisfied with the case management services you receive?” from prior versions of the AoA survey.
- Adding in a question regarding whether the person completed the survey on his/her own or if someone assisted him/her.
- Revising the question regarding whether case management services helped the individual to continue to live at home to whether the case management services helped the individual continue to live where they chose.
- Adding space for open-ended comments for improving the case management services and for additional comments about their case manager or case management services.

The final survey included 19 items; it may be found in Appendix A.

#### Translation

The survey was made available in Spanish and designed so that the form had both English and Spanish versions side-by-side.

The North/Eastside Senior Coalition, which has a contract for bilingual case management services for Dane County seniors, identified their clients who were to receive the Spanish/English version of the survey. A total of 28 Spanish/English versions of the surveys were mailed.

### Survey Population

A query in InfoMaker was used by the Senior Program Analyst in the Planning and Evaluation Unit with DCDHS to pull a listing of all clients in the DCDHS Information System who received case management services between January 1, 2016, and August 31, 2016, and who were reported into the DCHS Information System. This was generated on September 12, 2016, as an Excel spreadsheet. This was unduplicated by program, then by client in recognition that clients may have received case management services from more than one agency during the study period due to moving from one service area to another.

The next step was to ensure that an accurate list of clients and their addresses was developed and that case managers and agencies were appropriately identified. Lists of clients were sorted by the agency providing services. These were sent September 12, 2016, to Cheryl Batterman, AAA Manager, for distribution to agencies along with instructions to result in:

- Recording the name of the case manager with whom the client was most familiar. This was in a first name then last name format so that it read Jane Doe (for example) when the mail merge was to be made.
- Reviewing the address shown for each client and making any needed revisions directly on the spreadsheet.
- Adding missing addresses to the spreadsheet.
- Adding missing client names to the spreadsheet.
- If anyone was deceased, recording the date of death (as close to the date as possible) to avoid inadvertent delivery of a survey form.
- Having completed spreadsheets were returned by Noon on Monday, September 26, 2016.

Agencies were also asked to indicate whether the survey should be directed to a guardian, rather than the individual, and to provide the appropriate mailing address.

The majority of the spreadsheets were returned on or by the September 26 deadline with the final one arriving October 4. In reviewing the lists, it appeared that they were updated to include clients served through August 2016.

The data from spreadsheets were updated into a “master” spreadsheet that was “cleaned.” Agencies that indicated a client from the originally sent spreadsheet was not to be sent a survey were asked to “justify” the reason.

Of the original 2,003 rows of clients, 205 were cut, most frequently due to the person having passed away. Other reasons are cited in Table 1.

**Table 1:** Case Management Survey – Reason Rows of Clients were Not Included in Survey Mailing

Reason	Number	Percent
Deceased	89	43.4
No contact in 2016	2	1.0
Only received Medicare Part D Services	2	1.0
Moved out of County	37	18.0
Moved to a Nursing Home	18	8.8
Moved to Assisted Living	16	7.8
Moved to another Facility (includes Hospice, Rehab)	1	0.5
Changed service areas	33	16.1
Homeless – moved out of area	1	0.5
Unknown client	3	1.5
Other Reasons (Care Wisconsin client (2); only open 8 days (1))	3	1.5
Total	205	100.1 <sup>2</sup>

<sup>2</sup> Does not equal 100% due to rounding.

#### Random Sampling Method

The RAND function in Excel was used to generate a random number for each row in the spreadsheet. These were then arranged from the smallest to the largest with the first 1,200 then being included in the survey mailing. One was later excluded.

#### Survey Method

A total of 1,199 survey forms were mailed October 13 – 17, 2016. Envelopes were stuffed by Bonnie Wahrer, a Limited Term Employee, brought in to assist with the mailing.

Survey forms were sent out in DCDHS Department envelopes. A postage-paid, self-addressed return envelope was included.

Survey forms returned with bad addresses with forwarding addresses indicated were re-mailed until two weeks prior to the final due date. The exception was if a mailing address was outside Dane County, the survey form was not re-mailed. Of the 100 forms returned with bad addresses, 45 were re-mailed.

The number mailed and those that presumably made it to clients by agency may be found in Table 2 on the following page.

#### Client Confidentiality

Potential respondents were assured of confidentiality, but not anonymity – since by the agency having names and addresses, their identity was known for mailing purposes. Survey results were kept separate from any service records. Information is being released in aggregate form.

Each survey form had a 3-4 digit tracking number associated with it that was linked with demographics of the potential respondent. This was to keep from asking clients information already known to the Department and to reduce the length of the survey.

**Table 2:** Surveys by Disposition by Agency

Agency	Surveys Mailed	Returned with Bad Addresses and Not Re-mailed	Surveys to Clients
Colonial Club Senior Activity Center	93	3	90
DeForest Area Community & Senior Center	40	0	40
East Madison/Monona Coalition of the Aging	122	3	119
Fitchburg Senior Center	60	2	58
McFarland Senior Outreach Services	59	4	55
Middleton Senior Center	47	7	40
North/Eastside Senior Coalition	124	15	109
Northwest Dane Senior Services	49	1	48
Oregon Area Senior Center	75	1	74
South Madison Coalition of the Elderly	121	11	110
Southwest Dane Senior Outreach	40	2	38
Stoughton Area Senior Center	94	0	94
Sugar River Senior Center	35	2	33
Waunakee Senior Center	121	1	120
West Madison Senior Coalition	119	3	116
Total	1,199	55	1,144

Response Rate

The overall response rate was 40.6%; a response rate of 20% is considered acceptable for a one-time mail survey. There was considerable variation by agency as seen in Table 3.



Sample of Comments From Surveys That Were Excluded

*To Whoever this may concern. No one in our household has heard of [Case Manager]. Therefore, I cannot give you answers to this letter.*

*To the best of my recollection I have had no contact by phone or in person with [Case Manager] or any personnel from your office. Thank you.*

*I don't think I have a case manager. I have not heard from one.*

*I have not needed to use her yet. She seems to be a very nice lady.*

*Could I receive a list of services provided? I do not (nor did have) a case manager. I need one.*

**Table 3:** Response Rate by Agency

Agency	Surveys to Clients	Surveys Returned	Surveys Excluded	Useable Surveys	Response Rate
Colonial Club Senior Activity Center	90	41	3	38	42.2
DeForest Area Community & Senior Center	40	27	0	27	67.5
East Madison/Monona Coalition of the Aging	119	43	3	40	33.6
Fitchburg Senior Center	58	18	1	17	29.3
McFarland Senior Outreach Services	55	28	2	26	47.3
Middleton Senior Center	40	18	0	18	45.0
North/Eastside Senior Coalition	109	42	3	39	35.8
Northwest Dane Senior Services	48	20	2	18	37.5
Oregon Area Senior Center	74	35	1	34	45.9
South Madison Coalition of the Elderly	110	32	3	29	26.4
Southwest Dane Senior Outreach	38	19	0	19	50.0
Stoughton Area Senior Center	94	36	0	36	38.3
Sugar River Senior Center	33	16	2	14	42.4
Waunakee Senior Center	120	59	0	59	49.2
West Madison Senior Coalition	116	54	4	50	43.1
Total	1,144	488	24	464	40.6

The 24 survey forms shown in Table 3 as excluded for analysis all indicated that services had not been received in 2016.

The response rate for the English/Spanish surveys was 28.6% with 8 of the 28 surveys returned. Nearly 29% of these surveys were returned due to bad addresses with no forwarding addresses provided by the U.S. Postal Service.

Due to the range of response rates and to reflect the overall status of the program, a random sample of 314 surveys was pulled. A sample size of 317 was required for a confidence level of 95% but this was limited to 314 by the lower response rate by South Madison Coalition for the Elderly; thus the confidence interval (margin of error) was  $\pm 5.03$  rather than the desired  $\pm 5$ .

The dataset for this sample excluded returned survey forms where it was indicated that services had not been received in 2016 and where the only service received was assistance with the annual enrollment for Medicare Part D (Drug) or receiving a loan of medical equipment, i.e., wheelchair, walker, etc.

Pulling the random sample from the remaining 402 survey forms was accomplished by sorting the returned forms by Agency, then by survey number. The RAND function in Excel was used to generate a random number for each row in the spreadsheet. These were sorted by Agency, then by random number from the smallest to the largest. The number of surveys pulled by agency was based on the percent of clients to the overall total. This was used for the bulk of the report. Table 4 indicates the distribution of the surveys that were included in the overall program analysis.

**Table 4:** Percent of Case Management Clients Served by Agency and the Number of Surveys to Be Included for Overall Analysis

Agency	Percent of Clients Served	Number of Surveys to Be Included for Overall Analysis
Colonial Club Senior Activity Center	7.7	25
DeForest Area Community & Senior Center	3.3	10
East Madison/Monona Coalition of the Aging	10.2	32
Fitchburg Senior Center	4.7	15
McFarland Senior Outreach Services	4.3	14
Middleton Senior Center	3.7	12
North/Eastside Senior Coalition	11.1	35
Northwest Dane Senior Services	4.1	13
Oregon Area Senior Center	6.2	20
South Madison Coalition of the Elderly	9.7	26
Southwest Dane Senior Outreach	3.8	12
Stoughton Area Senior Center	7.5	24
Sugar River Senior Center	2.7	9
Waunakee Senior Center	10.7	34
West Madison Senior Coalition	10.3	33
Total	100.0	314

The full set of data and responses is included in the section of this report on Results by Contracted Agency starting on page 37.

## **IV. Findings**

Data were analyzed by the Senior Program Analyst in the Planning and Evaluation Unit of Dane County Department of Human Services.

Findings are presented in the following sections of the report:

- Demographics
- Municipalities
- Services Coordinated
- Participation in Service Planning
- Service Quality
- Overall Quality
- Benefits
- Recommendations for Improvement
- Results by Contracted Agency – includes all survey results, not just those from the random sample.

Briefly, some of the findings include:

- Survey respondents indicated their case managers treated them with respect (96%), returned their telephone calls in a timely manner (92%), explained services in a way they could understand (95%), and involved them in discussing and planning their services (91%).
- Slightly more than half (52%) of the respondents indicated their case manager developed a care plan for the services they needed, with a little more than two-thirds (67%) of those indicating they received a copy of the care plan.
- Persons of Color were significantly less likely than Whites to indicate their case manager did a good job of setting up services for them.
- Baby Boomers (1946-1964) were significantly less likely than other generations to indicate their case manager returned their phone calls in a timely manner.

- Survey respondents indicated that their case managers helped them get services they did not have before (81%), that their situations were better because of their case managers' help (92%), and that the case management services helped them continue to live where they chose (88%).
- Nearly 94% of survey respondents were satisfied with the case management services they received.

## **V. Limitations**

There are a number of limitations that are inherent in a study of this nature:

- The study was conducted by staff from the Planning and Evaluation Unit with the Dane County Department of Human Services rather than an independent third party.
- All useable surveys returned by December 2, 2016 were included in the data analysis. Surveys returned after that date were excluded.
- The number of questions that were missed by respondents either by being skipped or by omitting a page, led to the decision to analyze data based on the number of respondents for each question rather than using the total number of survey respondents, which is the usual methodology.

## **VI. Future Studies**

Suggestions for future studies include:

- Examine methods to increase the response rate among persons of color or to find other methods to gather their feedback regarding this service. Some possibilities may include conducting outreach efforts prior to the next survey and/or conducting focus groups in settings that are comfortable for each population.

## **VII. Next Steps**

This information will be shared with:

- DCDHS staff and managers
- Senior Focal Points
- Area Agency on Aging (AAA) – Access Committee
- Area Agency on Aging (AAA) Board of Directors
- General public via posting on the AAA web site

Additionally,

- Comments attributable to individual senior focal points will be shared with them.
- The survey instrument and/or methodology will be revised to address any issues raised in the section of this report on future studies.
- A 1-2 page synopsis of the report will be developed.
- Consideration will be given to developing a press release coinciding with the release of the report to increase awareness of this valuable Dane County service.

# Demographics

During the period of January 1, 2016, through August 31, 2016, 1,964 unduplicated clients received Dane County funded case management services.

Survey 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.

While 66% of the respondents in the overall sample were female compared with 68% of those who received services during the study period, this was not statistically significant.<sup>3</sup>

As shown in Table 5, respondents were more likely to be White (91%) than clients served during the study period (90%), although this was not statistically significant.<sup>4</sup>

The average age of respondents in the overall analysis was 77.3 compared with 77.5 for persons served during the study period.

**Table 5:** Demographics of Survey Respondents in the Sample Used for Overall Program Analysis Compared with Case Management Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Characteristic	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
<b>Gender</b>						
Female	1,326	67.5	817	68.1	206	65.6
Male	638	32.5	382	31.9	103	32.8
Unknown	0	0.0	0	0.0	5	1.6
Total	1,964	100.0	1,199	100.0	314	100.0
<b>Race/Ethnicity</b>						
Asian	11	0.6	5	0.4	0	0.0
Af. Amer/Black	114	5.8	72	6.0	15	4.8
Hispanic/Latinx	61	3.1	41	3.4	8	2.6
Native American	5	0.3	2	0.2	1	0.3
Pacific Islander	0	0.0	0	0.0	0	0.0
White	1,763	89.8	1,074	89.6	285	90.8
More than 1 Race	6	0.3	5	0.4	0	0.0
Unknown	4	0.2	0	0.0	5	1.6
Total	1,964	100.1 <sup>5</sup>	1,199	100.0	314	100.1 <sup>6</sup>
<b>Age at Survey</b>						
<50	3	0.2	3	0.3	1	0.3
50-54	3	0.2	1	0.1	0	0.0
55-59	8	0.4	5	0.4	1	0.3
60-64	201	10.2	121	10.1	33	10.5
65-69	356	18.1	227	18.9	46	14.7

<sup>3</sup>  $\chi^2 = 0.087506$ ,  $df=1$ ,  $p<.05$

<sup>4</sup>  $\chi^2 = 3.556531$ ,  $df=5$ ,  $p<.05$

<sup>5</sup> Does not equal 100% due to rounding.

<sup>6</sup> Does not equal 100% due to rounding.

Respondents ranged in age from 49 to 101. It should be noted that in accordance with DCDHS contracts with providers, persons must be age 60 and older to be eligible for this service.

At the time the survey forms were mailed, respondents had received services between 51 days and 11.8 years. Slightly over 30% of the respondents in the overall sample served during the study period received case management services for over three years contrasted with 25.8% of the clients served. Overall, respondents in the overall sample were representative of clients served during the study period in terms of length of time receiving case management services.<sup>7</sup>

**Table 5:** Demographics of Survey Respondents in the Sample Used for Overall Program Analysis Compared with Case Management Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Characteristic	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
70-74	279	14.2	168	14.0	42	13.4
75-79	259	13.2	170	14.2	41	13.1
80-84	338	17.2	203	16.9	65	20.7
85-89	295	15.0	176	14.7	54	17.2
90-94	172	8.8	101	8.4	21	6.7
95-99	39	2.0	20	1.7	4	1.3
100-104	7	0.4	2	0.2	1	0.3
105+	2	0.1	1	0.1	0	0.0
Unknown	2	0.1	1	0.1	5	1.6
Total	1,964	100.1 <sup>8</sup>	1,199	100.1 <sup>9</sup>	314	100.1 <sup>10</sup>
<b>Generation (Years Born)<sup>11</sup></b>						
Baby Boomer (1946-1964)	619	31.5	384	32.0	87	27.7
Silent (1929-1945)	995	50.7	606	50.5	171	54.5
Greatest (1900-1928)	343	17.5	204	17.0	51	16.2
Other/Unknown	7	0.4	5	0.4	5	1.6
Total	1,964	100.1 <sup>12</sup>	1,199	99.9 <sup>13</sup>	314	100.1 <sup>14</sup>

<sup>8</sup> Does not equal 100% due to rounding.

<sup>9</sup> Does not equal 100% due to rounding.

<sup>10</sup> Does not equal 100% due to rounding.

<sup>11</sup> Scholars and the literature differ as to the exact dates for each generation. The sources for these categories include the Pew Research Centers and Michael T. Robinson's "What Generation Are You?" found on Career Planner.

<sup>12</sup> Does not equal 100% due to rounding.

<sup>13</sup> Does not equal 100% due to rounding.

<sup>14</sup> Does not equal 100% due to rounding.

<sup>7</sup>  $\chi^2 = 7.702605$ ,  $df=6$ ,  $p<.05$



**Table 5:** Demographics of Survey Respondents in the Sample Used for Overall Program Analysis Compared with Case Management Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Characteristic	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
<b>Length of Time Receiving Case Management Services as of 10.5.2016</b>						
< 6 months	393	20.0	239	19.9	63	20.1
6-12 months	473	24.1	298	24.9	59	18.8
13-18 months	221	11.3	136	11.3	41	13.1
19-24 months	150	7.6	87	7.3	20	6.4
25-30 months	122	6.2	76	6.3	16	5.1
31-36 months	98	5.0	58	4.8	14	4.5
37 months+	506	25.8	305	25.4	96	30.6
Unknown	0	0.0	0	0.0	5	1.6
Total	1,964	100.0	1,199	99.9 <sup>15</sup>	314	100.2 <sup>16</sup>

<sup>15</sup> Does not equal 100% due to rounding.

<sup>16</sup> Does not equal 100% due to rounding.

# Municipalities

Clients who received case management services between January 1, 2016 and August 31, 2016, resided in nearly every municipality in Dane County. Five of the 61 municipalities were not represented: City of Edgerton, a portion of which is in Dane County; Towns of Christiana and York; and Villages of Rockdale and Shorewood Hills.

Slightly more than half (56%) of all clients served resided in a City with another quarter living in a Village and nearly 15% hailing from one of the Towns.

The respondents in the sample were representative of the clients served based on overall municipality of city, town, or village.

**Table 6:** Municipalities of Survey Respondents in Sample Compared with Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Municipality	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
<b>Cities</b>	<b>1,102</b>	<b>56.1</b>	<b>691</b>	<b>57.6<sup>17</sup></b>	<b>176</b>	<b>56.1<sup>18</sup></b>
Edgerton	0	0.0	0	0.0	0	0.0
Fitchburg	101	5.1	63	5.3	16	5.1
Madison	653	33.3	406	33.9	110	35.0
Middleton	55	2.8	35	2.9	8	2.5
Monona	71	3.6	45	3.8	7	2.2
Stoughton	132	6.7	87	7.3	23	7.3
Sun Prairie	87	4.4	54	4.5	12	3.8
Verona	3	0.2	1	0.1	0	0.0
<b>Towns<sup>19</sup></b>	<b>291</b>	<b>14.8</b>	<b>168</b>	<b>14.0</b>	<b>40</b>	<b>12.7</b>
Albion	3	0.2	2	0.2	0	0.0
Berry	4	0.2	3	0.3	1	0.3
Black Earth	1	0.1	1	0.1	0	0.0
Blooming Grove	6	0.3	5	0.4	1	0.3
Blue Mounds	6	0.3	2	0.2	0	0.0
Bristol	6	0.3	4	0.3	1	0.3
Burke	3	0.2	1	0.1	0	0.0
Christiana	0	0.0	0	0.0	0	0.0
Cottage Grove	6	0.3	4	0.3	2	0.6
Cross Plains	15	0.8	8	0.7	3	1.0
Dane	5	0.3	1	0.1	0	0.0
Deerfield	2	0.1	1	0.1	0	0.0
Dunkirk	7	0.4	2	0.2	0	0.0

<sup>17</sup> Row totals for Cities will differ slightly due to rounding.

<sup>18</sup> Row totals for Cities will differ slightly due to rounding.

<sup>19</sup> Row totals for Towns will differ slightly due to rounding.

**Table 6:** Municipalities of Survey Respondents in Sample Compared with Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Municipality	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
<b>Towns</b>						
Dunn	13	0.7	7	0.6	1	0.3
Madison	30	1.5	19	1.6	4	1.3
Mazomanie	5	0.3	3	0.3	0	0.0
Medina	6	0.3	4	0.3	1	0.3
Middleton	6	0.3	4	0.3	1	0.3
Montrose	7	0.4	4	0.3	2	0.6
Oregon	20	1.0	11	0.9	0	0.0
Perry	3	0.2	2	0.2	1	0.3
Pleasant Springs	8	0.4	4	0.3	0	0.0
Primrose	5	0.3	3	0.3	1	0.3
Roxbury	2	0.1	2	0.2	0	0.0
Rutland	8	0.4	6	0.5	2	0.6
Springdale	4	0.2	3	0.3	2	0.6
Springfield	17	0.9	14	1.2	2	0.6
Sun Prairie	8	0.4	4	0.3	1	0.3
Vermont	1	0.1	1	0.1	0	0.0
Verona	10	0.5	8	0.7	2	0.6
Vienna	6	0.3	5	0.4	1	0.3
Westport	68	3.5	30	2.5	11	3.5
York	0	0.0	0	0.0	0	0.0
<b>Villages<sup>20</sup></b>	<b>493</b>	<b>25.1</b>	<b>313</b>	<b>26.1</b>	<b>88</b>	<b>28.0</b>
Belleville	29	1.5	21	1.8	5	1.6
Black Earth	20	1.0	14	1.2	4	1.3
Blue Mounds	8	0.4	5	0.4	1	0.3
Brooklyn	3	0.2	2	0.2	1	0.3
Cambridge	8	0.4	6	0.5	1	0.3
Cottage Grove	12	0.6	10	0.8	2	0.6
Cross Plains	17	0.9	10	0.8	3	1.0

<sup>20</sup> Row totals for Villages will differ slightly due to rounding.

**Table 6:** Municipalities of Survey Respondents in Sample Compared with Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Municipality	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
<b>Villages</b>						
Dane	2	0.1	1	0.1	0	0.0
Deerfield	2	0.1	1	0.1	0	0.0
DeForest	50	2.6	29	2.4	8	2.5
Maple Bluff	2	0.1	2	0.2	1	0.3
Marshall	13	0.7	9	0.8	4	1.3
Mazomanie	11	0.6	6	0.5	1	0.3
McFarland	44	2.2	32	2.7	10	3.2
Mount Horeb	54	2.8	25	2.1	7	2.2
Oregon	87	4.4	57	4.8	18	5.7
Rockdale	0	0.0	0	0.0	0	0.0
Shorewood Hills	0	0.0	0	0.0	0	0.0
Waunakee	120	6.1	72	6.0	20	6.4
Windsor	11	0.6	11	0.9	2	0.6
<b>Other</b>	<b>78</b>	<b>4.0</b>	<b>27</b>	<b>2.3<sup>21</sup></b>	<b>10</b>	<b>3.2</b>
Post Office Box	8	0.4	5	0.4	2	0.6
Current address is out of County	8	0.4	5	0.4	0	0.0
Current address is out of state	6	0.3	4	0.3	0	0.0
Address is not in DCDHS System or not considered valid by Access Dane or the US Postal Service for geo-coding purposes	56	2.9	13	1.1	8 <sup>22</sup>	2.5
<b>Total<sup>23</sup></b>	<b>1,964</b>	<b>100.0</b>	<b>1,199</b>	<b>100.0</b>	<b>314</b>	<b>100.0</b>

<sup>21</sup> Row total for other will differ slightly due to rounding.

<sup>22</sup> Includes 5 returns for which the address could not be determined.

<sup>23</sup> Percentages will not equal 100% due to rounding.

# Services Coordinated

Case managers coordinate a wide variety of services for case management participants.

Of the survey respondents, 306 indicated one or more services with which their case managers provided coordination assistance.

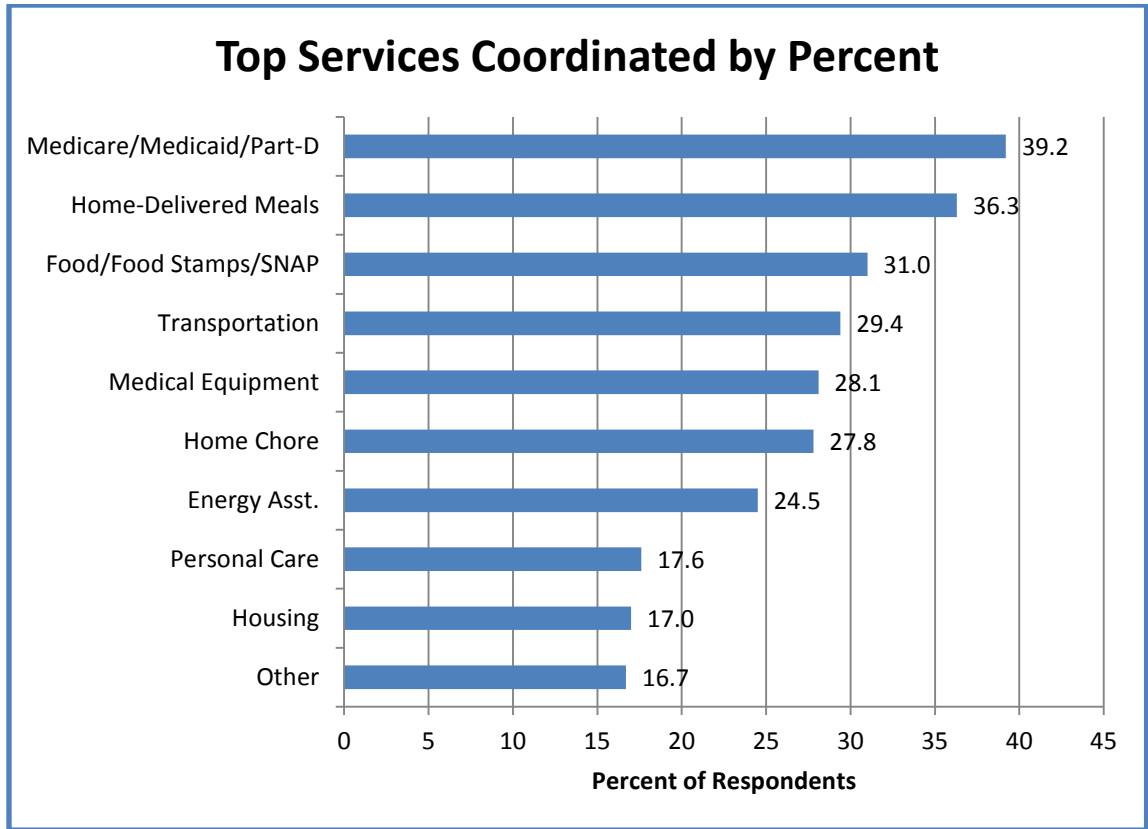
The most frequently cited assistance (39%) was helping with paperwork associated with Medicare/Medicaid/ Medicare Part D.

Case managers provided assistance with applying for benefits such as energy assistance (25%) and food assistance/ Food Stamps/Supplemental Nutritional Assistance Program (31%) that helped to extend one's income.

Services critical to helping persons remain in their own home, such as home-delivered meals (36%), transportation (29%), medical equipment (28%), and home chore services (28%) were also coordinated.

The category of other included: clothing, yardwork, information, paperwork, financial management, and other related services. As one respondent put it, *"Any and everything I need."*

**Graph 1: Most Frequently Cited Services Coordinated by Case Manager**



N = 306. Respondents could cite more than one service.

# Participation in Service Planning

Four items on the survey examined client perception of whether the case manager involved the client in planning the services to be received. The 2016 survey marked the first time that questions related to the care plan were included:

- Did your case manager develop a care plan for the services you need?
- Did you receive a copy of the care plan?

Of the survey respondents, 91% indicated their case managers involved them in discussing and planning their services and 93% indicated they were able to select the services they received.

Per the 2015 County contracts with Agencies, a case management service plan is to be developed when a case is opened for service. Development of the plan is to be documented in the case notes.

Slightly more than half (52%) of the respondents indicated their case manager developed a care plan for the services they needed, with a little more than two-thirds (67%) of those indicating they received a copy of the care plan.

**Table 7:** Involvement in Service Planning

Survey Question	Percent of Respondents			
	Yes	No	Don't Know	Resp. (N)
Does your case manager involve you in discussing and planning your services?	90.8	5.1	4.1	294
Did your case manager develop a care plan for the services you need?	52.0	19.7	28.3	254
Did you receive a copy of the care plan? <sup>24</sup>	67.4	13.6	13.6	132
Are you able to select the services you receive?	93.3	6.7		255 <sup>25</sup>

## Sample of Comments from Survey Respondents

*I am using some of the services she recommended. Thank you. I now know who can help me as life changes [for] me.*

*I wish my mother were more agreeable to utilizing more offered services.*

*We don't have a plan of care that we know of. We live comfortably at home. I have Sara as my case manager. She has helped me for several years. She is so wonderful! Drops by to see me, calls, always comes when I need her.*

<sup>24</sup> This just examines those who indicated that Yes, a care plan was developed. Will not equal 100% as 5.3% of those who indicated that their case manager developed a care plan, did not respond to the question of whether they received a copy of the care plan. Overall on this item, 38% of respondents indicated they did not receive a copy of the care plan and 22% indicated they don't know if they did.

<sup>25</sup> One additional client indicated he/she was "somewhat" able to select the services received. "Don't Know" was not an option on this item.

Graph 2 provides a comparison of the Dane County survey results conducted in 2016 with results of the 2015 National Survey of Older Americans Act Participants survey for the Midwest Census Region - comprised of Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin – and with the national (non-stratified) results. The data is reported by the Administration on Aging via the AGING Integrated Database (AGID); 2015 is the most recent year for which data were compiled at both regional and national levels.

Respondents to the National survey were significantly less likely to indicate their case manager involved them in planning and discussing their services than did respondents to the Midwest Census Region and Dane County.<sup>26</sup>

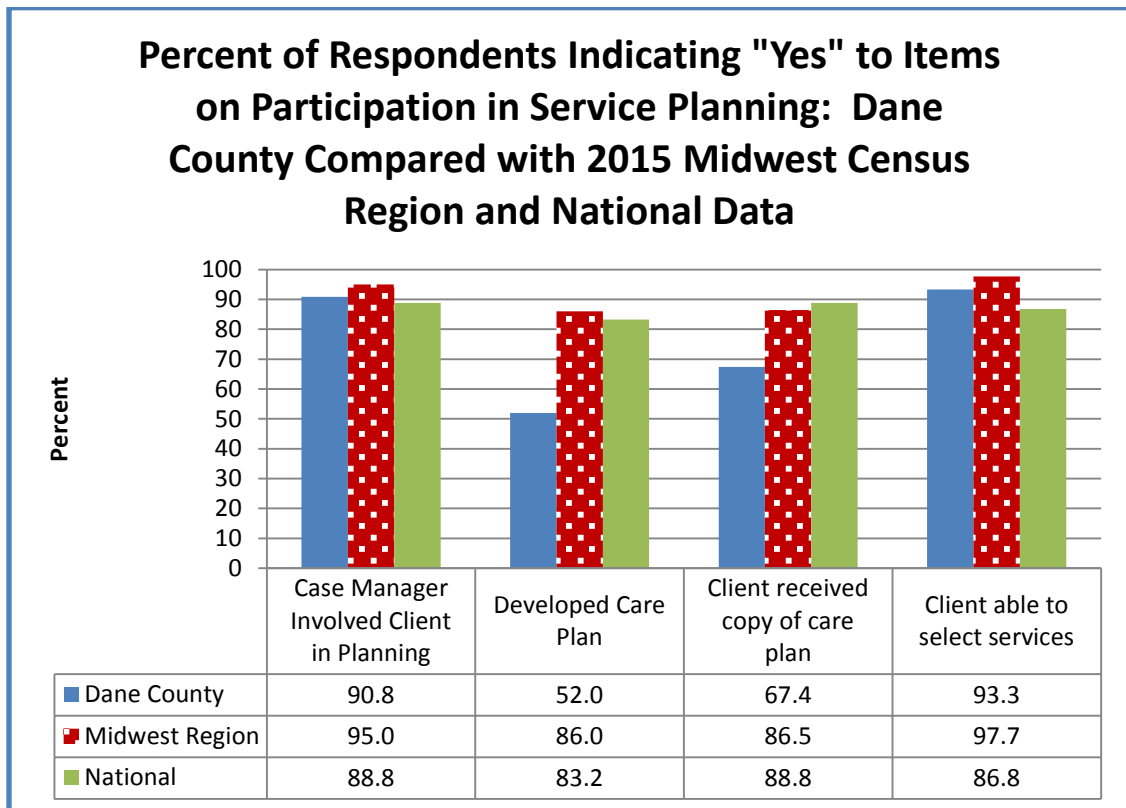
However, Dane County respondents were significantly less likely than their Midwest Census Region and National counterparts to indicate that their case manager developed a care plan for the services they needed.<sup>27</sup>

While just 67% of Dane County respondents indicated they received a copy of the care plan compared with 88.8% of National respondents, this was not a statistically significant difference.

<sup>26</sup>  $\chi^2 = 7.192999$ ,  $df=2$ ,  $p<05$ .

<sup>27</sup>  $\chi^2 = 11.91184$ ,  $df=2$ ,  $p<.05$ .

**Graph 2:** Percent of Respondents Indicating “Yes” to Items Related to Participation in Service Planning: Dane County Compared with 2015 Results for the Midwest Census Region and National Data



Midwest Census Region = Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

# Service Quality

Survey respondents rated their case managers highly in treating them with respect (96%), returning their phone calls in a timely manner (92%), and explaining services in a way they could understand (95%).

While the majority of respondents (83%) indicated their case manager did a good job of setting up services for them, this was also the lowest rated item in this section.

Service quality was further examined based on the gender, age group, generation, and race. The data for Dane County was also compared with that available for the Midwest Census region and National data.

**Table 8:** Responses to Service Quality Related Questions

Survey Question	Percent of Respondents			
	Yes	No	Don't Know	Resp. (N)
Does your case manager return your phone calls in a timely manner?	92.3	3.0	4.7	298
Does your case manager explain your services in a way you can understand?	95.4	2.6	2.0	304
Does your case manager treat you with respect?	96.4	1.6	2.0	304
Does your case manager do a good job setting up services (transportation, meals, medical appointments, etc.) for you?	83.0	6.9	10.1	277

## Sample of Comments from Survey Respondents

*Sarah explains everything in simple words so I can understand the help she reached for me! Thanks Sarah!!*

*In the past eight years, Kathy has been instrumental in my living an independent life and establishing my affordable health care. What I most admire about her help is her constant and thorough attention to a problem; her always cheerful and kindly disposition! She is excellent in her field!*

*More timely response to phone messages.*

*Gail... did an excellent job of explaining Medicare A and B to me. She used language that was easy to understand and was very organized in her presentation. She also provided options for following through with obtaining the right plan for me.*

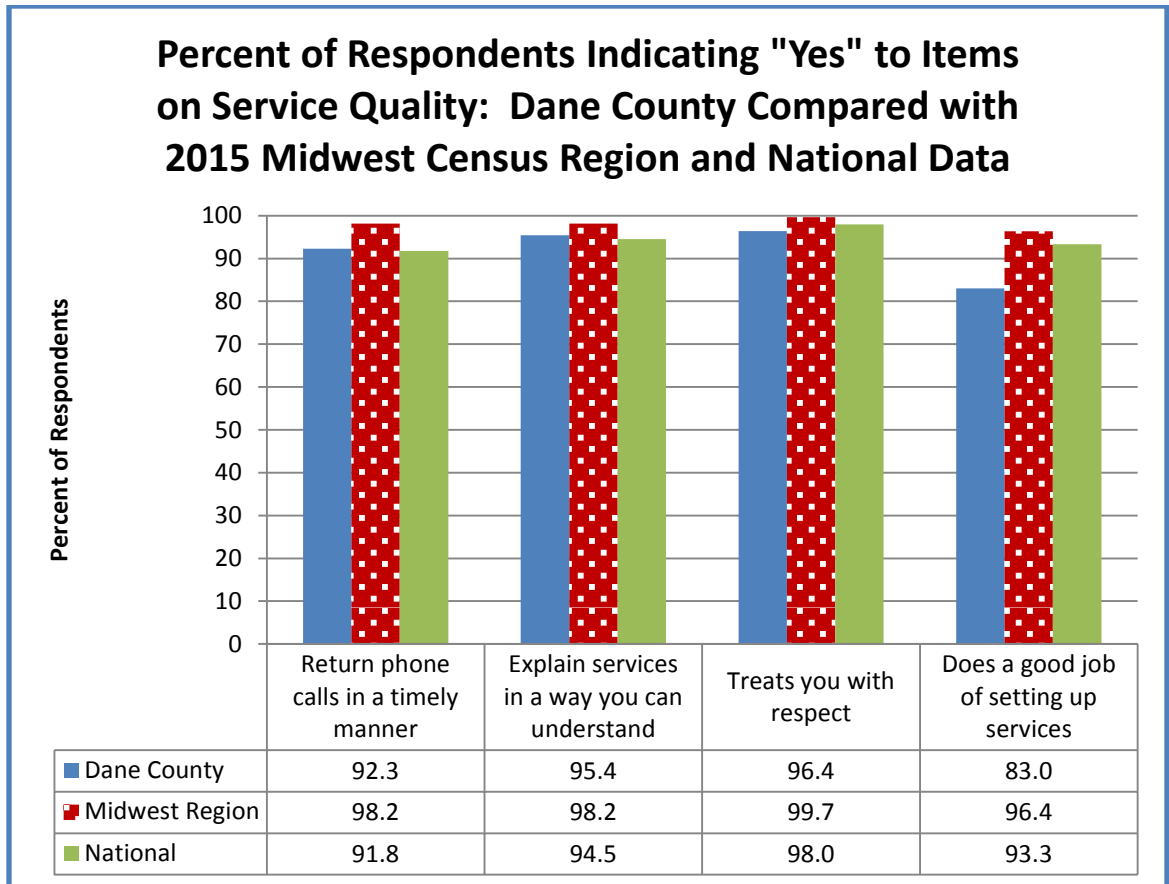


Graph 3 provides a comparison of the Dane County survey results conducted in 2016 with results of the 2015 National Survey of Older Americans Act Participants survey for the Midwest Census Region and with the National (non-stratified) results.

Participants in the National survey were significantly less likely to indicate that their case manager returned their phone calls in a timely manner<sup>28</sup> than did the Midwest Census Region and Dane County respondents.

While it appears in this graph that there could be a significant difference in terms of the case manager doing a good job of setting up services, when only looking at Yes/No responses in Dane County – excluding those who “Don’t Know,” as is done in the National survey, the percent of respondents who indicated “Yes” becomes 92%.

**Graph 3:** Percent of Respondents Indicating “Yes” to Items Related to Service Quality: Dane County Compared with 2015 Results for the Midwest Census Region and National Data



Midwest Census Region = Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin

<sup>28</sup>  $\chi^2 = 7.456328$ ,  $df=2$ ,  $p<.05$ .

Responses to survey items related to service quality were compared for People of Color (those with a racial/ethnic background of Hispanic/Latinx, African-American/Black, Asian, Pacific Islander, Native American) and those considered White/Caucasian. As seen in Graph 4, there was some variation between how people of color and Whites perceived the quality of services.

People of Color were slightly less likely than Whites to indicate that their case managers “always” returned their phone calls in a timely manner, explained services in a way they could understand, or treated them with respect. None of these variations was statistically significant.

While not shown in the graph, there was no significant difference between the 91% of Persons of Color and 94% of Whites who indicated their case manager involved them in discussing and planning their services.

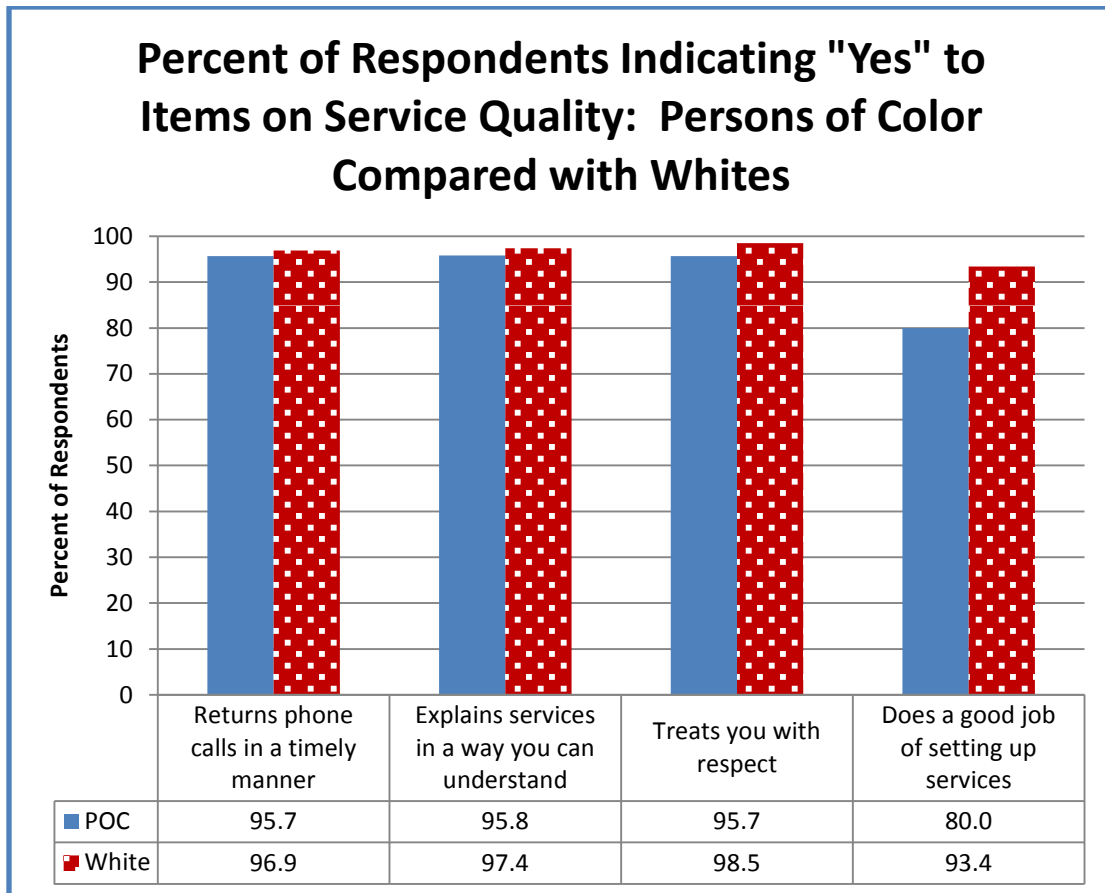
However, Persons of Color were significantly less likely to indicate their case manager did a good job of setting up services for them.<sup>29</sup>

There were no significant differences on these items based on gender. When it comes to age, Baby Boomers (born 1946-1964) were significantly less likely to indicate their case manager returned their phone calls in a timely manner.<sup>30</sup>

<sup>29</sup>  $\chi^2 = 4.720781$ ,  $df=1$ ,  $p<.05$ .

<sup>30</sup>  $\chi^2 = 7.174159$ ,  $df=2$ ,  $p<.05$ .

**Graph 4:** Comparison of Responses to Items Related to Quality of Services for People of Color and Whites



N for people of color = 23 for phone calls and treating with respect, 24 for explaining services, and 20 for setting up services. N for Whites = 261 for phone calls, 274 for explaining services, 275 for treating with respect, and 229 for setting up services.

# Overall Quality

Nearly 94% of survey respondents were satisfied with the case management services they received.

Northwest Dane Senior Services, Oregon Area Senior Center, Southwest Dane Senior Outreach, and Stoughton Area Senior Center had the distinction of 100% of the respondents to this item indicating they were satisfied with the case management services they received.

Compared to overall respondents, those receiving services from Fitchburg Senior Center<sup>31</sup> and Sugar River Senior Center<sup>32</sup> were significantly less satisfied. This particularly was reflected in a few of the written comments for Sugar River as seen in the following:

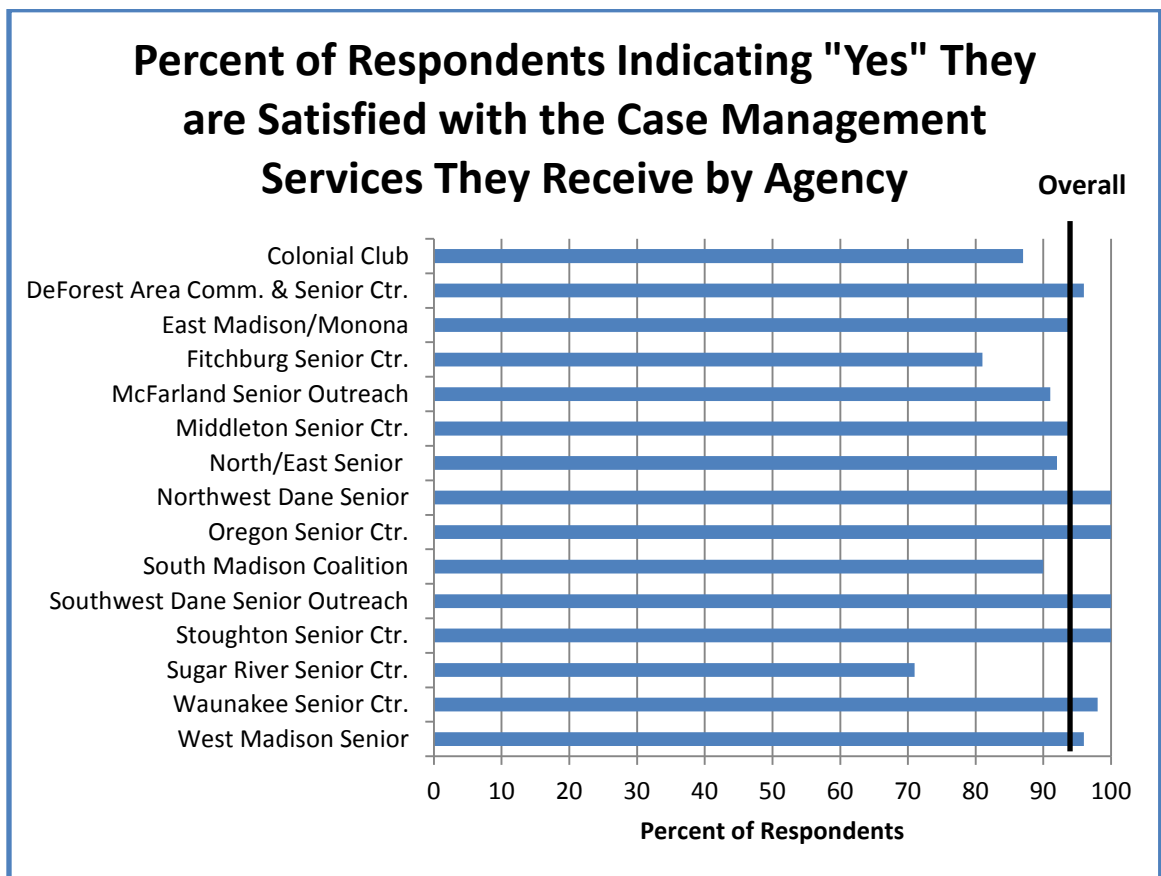
*They would not help us at all here in Belleville. Needed to call ADRC in Madison to get any help. We simply avoid this center now in Belleville.*

*[Previous Case Manager] used to check on me regularly. [New Case Manager]- I'm lucky to get in touch with her. I always have to leave a message or have someone setup an appointment to get in touch with her! Poor services!*

<sup>31</sup>  $\chi^2 = 4.256414$ ,  $df=1$ ,  $p<.05$ .

<sup>32</sup>  $\chi^2 = 6.009056$ ,  $df=1$ ,  $p<.05$ .

**Graph 5:** Percent of Respondents by Agency Indicating “Yes” They are Satisfied with the Case Management Services They Receive



N = 424. This graphs uses all surveys rather than just the sample to account for smaller populations among some agencies.

Overall, survey respondents rated their case management services quite highly with 55% rating them as Excellent, 28% as Very Good, 10% as Good.

Just 7% of the survey respondents rated case management services as fair or poor.

#### Sample of Comments from Survey Respondents

*We are well satisfied with the service.*

*They go over and above to help us.*

*Excellent support and help.*

*Greg is the best; helpful, very knowledgeable and professional. Can't imagine anyone more helpful or nicer.*

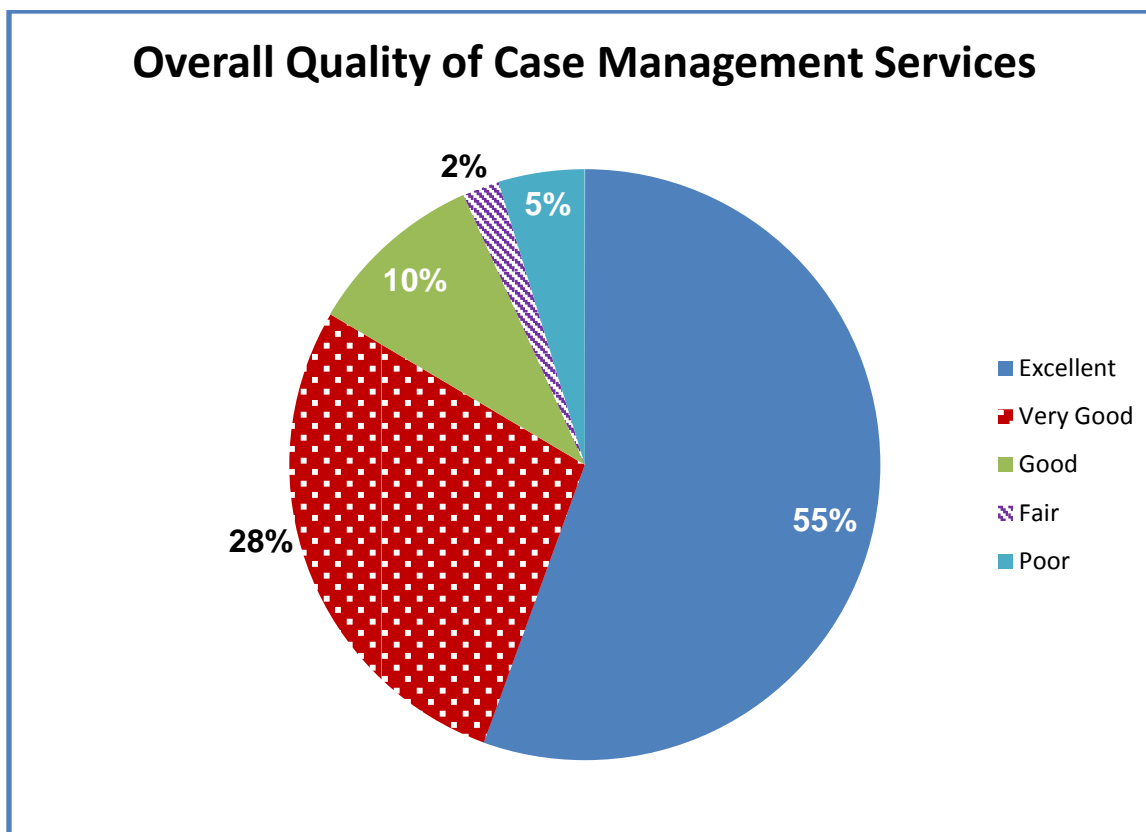
*Carrie has so much energy - she helps if you're down and I need that. I think she's the best we've had in years.*

*I think Lynn is wonderful! She really cares about me and all of the other seniors (from what I've seen). She's really great!!! Thanks for asking!*

*Kelly is a wonderful case manager and has been a wonderful help. It makes for a secure feeling.*

*Very satisfied. Jean is an excellent case manager and giving person. Those residents that have her as a case worker - keep it that way.*

**Graph 6:** Overall Quality of Case Management Services by Percent of Respondents



N = 297

Graph 7 provides a comparison of the Dane County survey conducted in 2016 with results of the 2015 National Survey of Older Americans Act Participants survey for the Midwest Census Region and with the national (non-stratified) results. The data is reported by the Administration on Aging via the AGing Integrated Database (AGID); 2015 is the most recent year for which data were compiled at both regional and National levels.

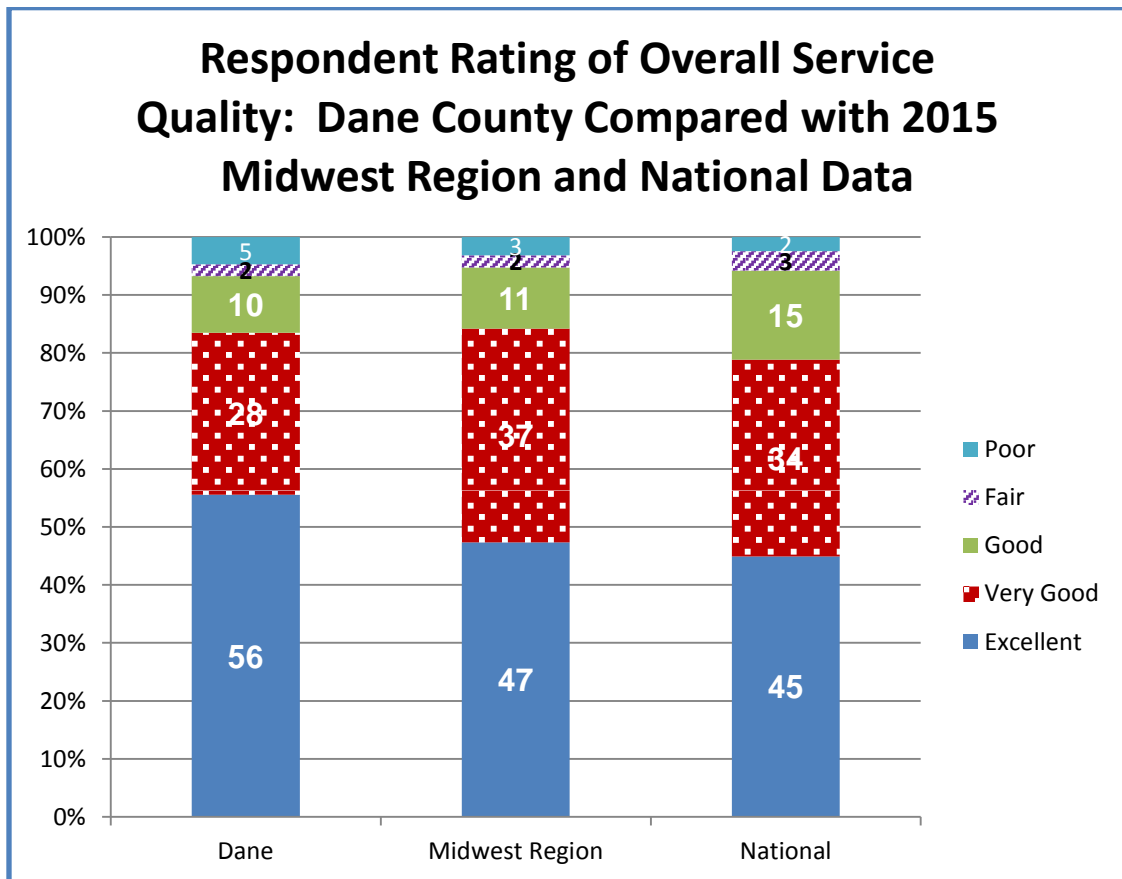
While Dane County survey respondents were more likely to rate their case management services as “excellent,” the percent of persons rating the services positively (excellent, very good, or good) was virtually the same for Dane County at 94% as it was for the Midwest Census Region at 95% and the National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

The overall quality of case management services was also examined based on gender, race/ethnic status, generation, and length of time case management services had been received.

Males (95%) and females (93%) rated the overall quality of case management services positively (excellent, very good, and good.) There was no significant difference between the two groups as to how the overall quality of case management services were rated.<sup>33</sup>

<sup>33</sup>  $\chi^2=4.291492$ ,  $df=4$ ,  $p<.05$ .

**Graph 7:** Comparison of Dane County Respondents Rating of Overall Quality of Case Management Services With Respondents from 2015 National Survey of Older Americans Act Participants Survey for the Midwest Census Region and Nationally



Midwest Census Region = Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin

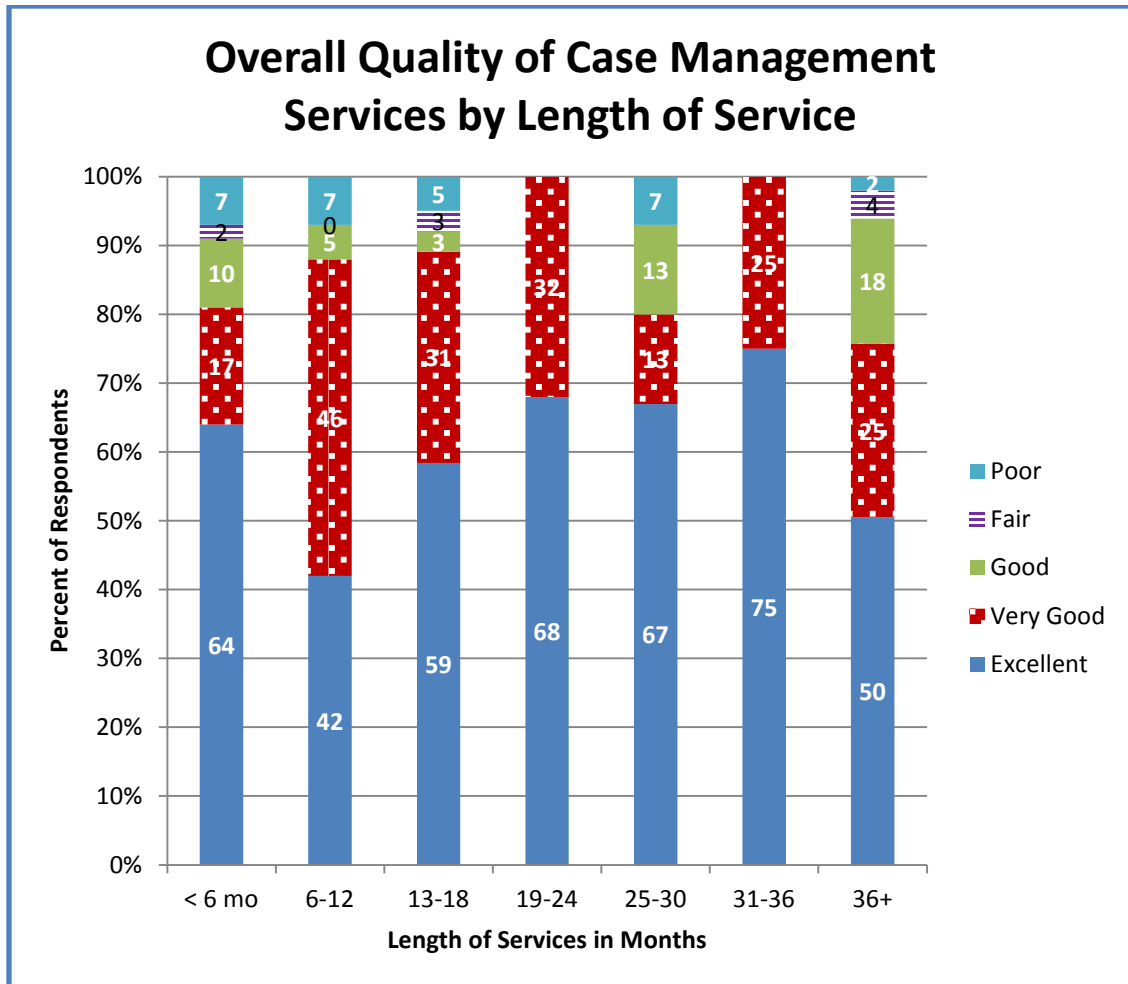
N = 297 for DCDHS, 95 for Midwest Census Region, and 412 for National.

There was no statistically significant difference<sup>34</sup> in how people of color (those with a racial/ethnic background of Hispanic/Latinx, African-American/Black, Asian, Pacific Islander, Native American) perceived the overall quality of case management services compared with Whites/Caucasians.

Despite a smaller percentage of Baby Boomers – born 1946-1964 - (88%) rating the services as excellent, very good, or good compared with the Greatest – born 1900-1928 - (94%) and Silent – born 1929-1945 - (96%) generations, this was not a significant difference.<sup>35</sup>

There was, however, a significant difference<sup>36</sup> in terms of overall quality of case management services based on the length of time case management services had been received by survey respondents. Persons who received services for 6-12 months were less likely (42%) than persons who received services for 31-36 months (75%) to rate the services as “excellent.” Overall, at least 91% of the survey respondents in each service grouping rated the services positively – excellent, very good, or good.

**Graph 8:** Comparison of Rating of Overall Quality of Case Management Services by Length of Time Receiving Services



N – for < 6 months = 58; 6-12 months = 57; 13-18 months = 39; 19-24 months = 19; 25-30 months = 15; 31-36 months = 12; 36+ months = 92.

<sup>34</sup>  $\chi^2=2.041198$ ,  $df=4$ ,  $p<.05$ .

<sup>35</sup>  $\chi^2=8.060664$ ,  $df=8$ ,  $p<.05$ .

<sup>36</sup>  $\chi^2=41.47296$ ,  $df=24$ ,  $p<.05$ .

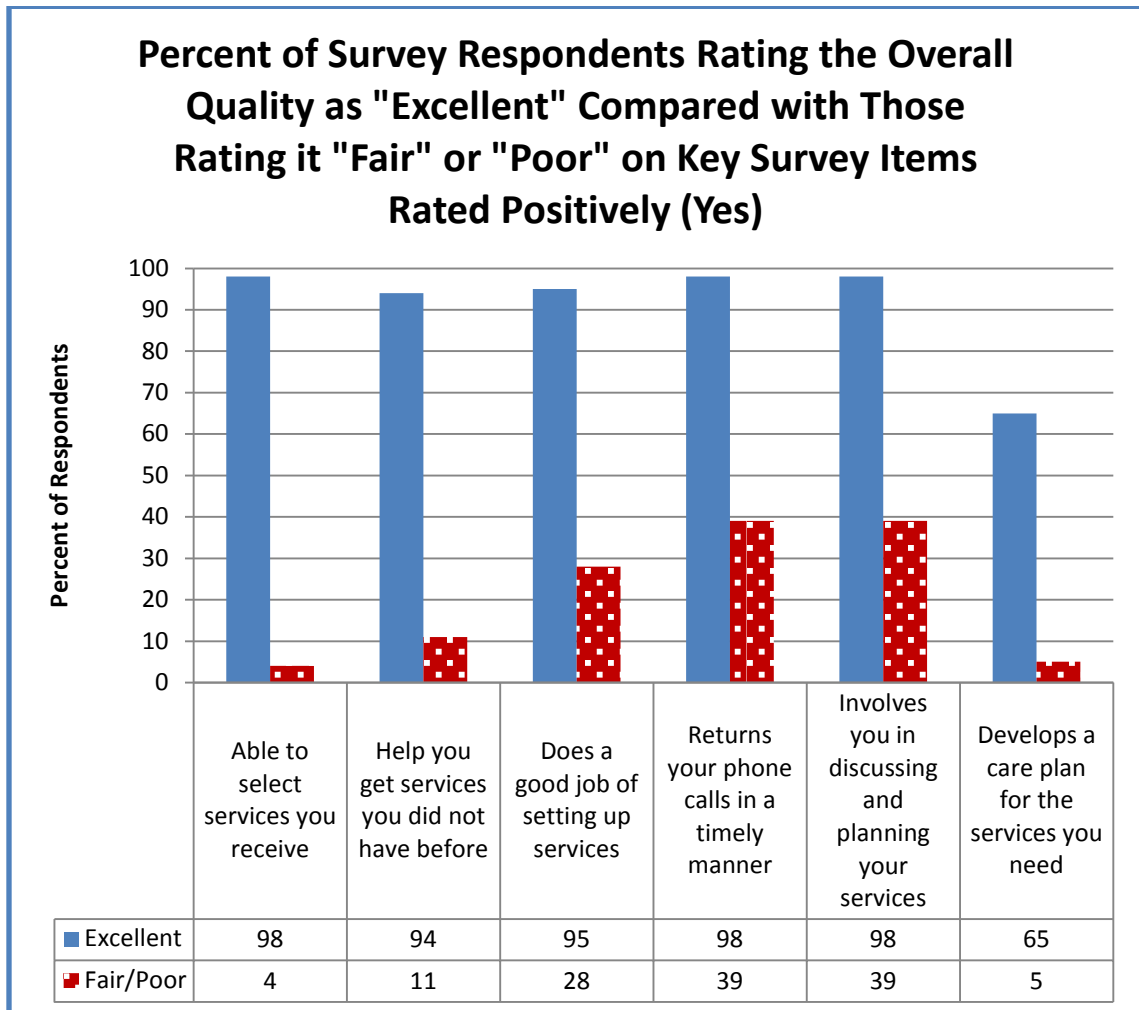
Survey respondents who rated the overall quality of case management services as “Excellent” were also more likely to rate their case manager positively compared with respondents who rated the overall quality of case management services as “Fair” or “Poor.”

Of respondents who rated the overall quality of case management services as “Excellent,” 98% indicated they were able to select the services they received compared with 4% of those who rated the overall quality as “Fair” or “Poor.”

Respondents who rated the overall quality of case management services as “Excellent” were more likely than those who rated it as “Fair” or “Poor” to indicate their case manager helped them get services they did not have before, their case managers did a good job of setting up services, returned their phone calls in a timely manner, and involved them in discussing and planning their services.

Of those who rated the overall case management services “Excellent,” 65% indicated their case manager developed a care plan for the services they needed contrasted with just 5% of those who rated the services “Fair” or “Poor.”

**Graph 9:** Comparison of Overall Quality Rating With Rating of Key Items



N = 164 for overall quality as “Excellent” and N = 20 for overall quality as Fair or Poor.

# Benefits

The survey also examined some of the benefits of receiving case management services.

Survey respondents indicated their case manager helped them get services they did not have before (81%) and their situation was better because of their case managers' help (92%).

Of the respondents to the survey, 88% indicated case management services helped them to continue to live where they chose.

The lowest-rated area was, "As a result of receiving case management services, do you have a better idea of where to get information about other services?" On this item, 22% of respondents indicated "No." Part of the lower response rate may have been due to respondents indicating that if they had a question, they went to their case manager.

Graph 10, on the following page, provides a comparison of the Dane County survey conducted in 2016 with results of the 2015 National Survey of Older Americans Act Participants survey for the Midwest Census Region and with the national (non-stratified) results.

**Table 9:** Benefits of Receiving Case Management Services by Survey Item

Survey Question	Percent of Respondents			
	Yes	No	Don't Know	Respondents (N)
Does your case manager help you get services that you did not have before?	81.4	10.0	8.6	280
As a result of receiving the case management services, do you have a better idea of where to get information about other services?	77.6	22.4		277
Is your situation better because of your case manager's help?	91.8	8.2		279
Do the case management services help you continue to live where you choose?	87.8	12.2		255

## Sample of Comments from Survey Respondents

*Jennifer has always been pleasant and helpful to me - to live in my home. I'll forever be thankful.*

*I ended up finding housing on my own. Why this woman gets a pay check is beyond me. She was no help at all!*

*Joel was very prompt in responding, listening to our situation and making suggestions. He does a good job connecting with other agencies and following up.*

*My case worker was able to get volunteers to help with outside work to be done at my duplex. Also trying very hard to get coverage for medicines no longer being covered by Medicare D insurance. She is very good and willing to talk when needed.*

*Julie... has helped me a lot to remain in my home and get chore help - this has been wonderful!*



Respondents to the Dane County survey were significantly more likely to indicate their case manager helped them get services they did not have before compared with the respondents to the 2015 National Survey.<sup>37</sup>

Survey respondents from Dane County (78%) were similar to the 2015 respondents from the Midwest Region (75%) and respondents nationally (72%) in indicating that as a result of receiving case management services, they have a better idea of where to get information about other services. This was not statistically significantly.<sup>38</sup>

There was no significant difference among the three groups in terms of whether their situation was better because of their Case Manager's help.<sup>39</sup>

Dane County survey respondents (88%) were significantly less likely than 2015 survey respondents from the Midwest Region (97%) and nationally (93%) to indicate that case management services helped them to continue to live at home or where they chose.<sup>40</sup> The question on the national survey, "Do the services help you continue to live in your own home?"

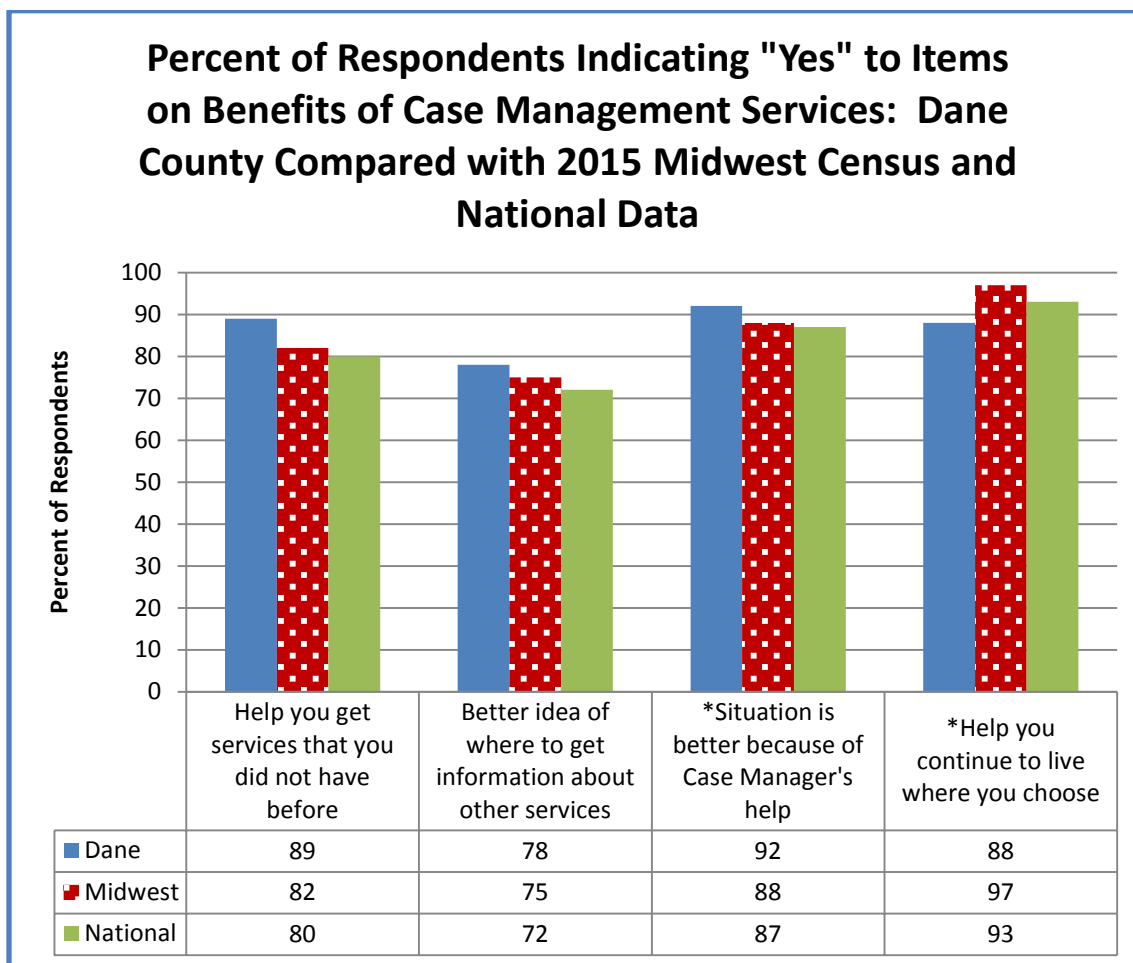
<sup>37</sup>  $\chi^2=9.207355$ ,  $df=2$ ,  $p<.05$ .

<sup>38</sup>  $\chi^2=2.934492$ ,  $df=2$ ,  $p<.05$ .

<sup>39</sup> Question at the national level was worded slightly different, "Has your situation improved because of the services your case manager arranges?"

<sup>40</sup>  $\chi^2=10.46414$ ,  $df=2$ ,  $p<.05$ .

**Graph 10:** Comparison of Dane County Respondents Rating of Benefits of Case Management Services with Respondents from 2015 National Survey of Older Americans Act Participants Survey for the Midwest Census Region and Nationally



Midwest Census Region = Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

\*Indicates slight wording difference in the survey items.

differed from the question on the Dane County survey, “Do the case management services help you continue to live where you choose?” The change was made on the Dane County survey due to the number of respondents in earlier surveys indicating they no longer lived at home – but in an apartment.

Responses to survey items related to the benefits of case management services were compared for People of Color (those with a racial/ethnic background of Hispanic/Latinx, African-American/Black, Asian, Pacific Islander, Native American) and persons who were considered White/Caucasian. This is seen in Graph 1.

There were no significant differences between People of Color and Whites in indicating their case managers helped them get services they had not had before<sup>41</sup>, in having a better idea of where to get information about other services<sup>42</sup>, and in indicating their situation was better because of their case managers’ help<sup>43</sup>. There was no statistical difference between these two populations in indicating the services helped them to continue to live where they chose.<sup>44</sup>

There were also no significant differences based on gender, generation, or length of time services were received.

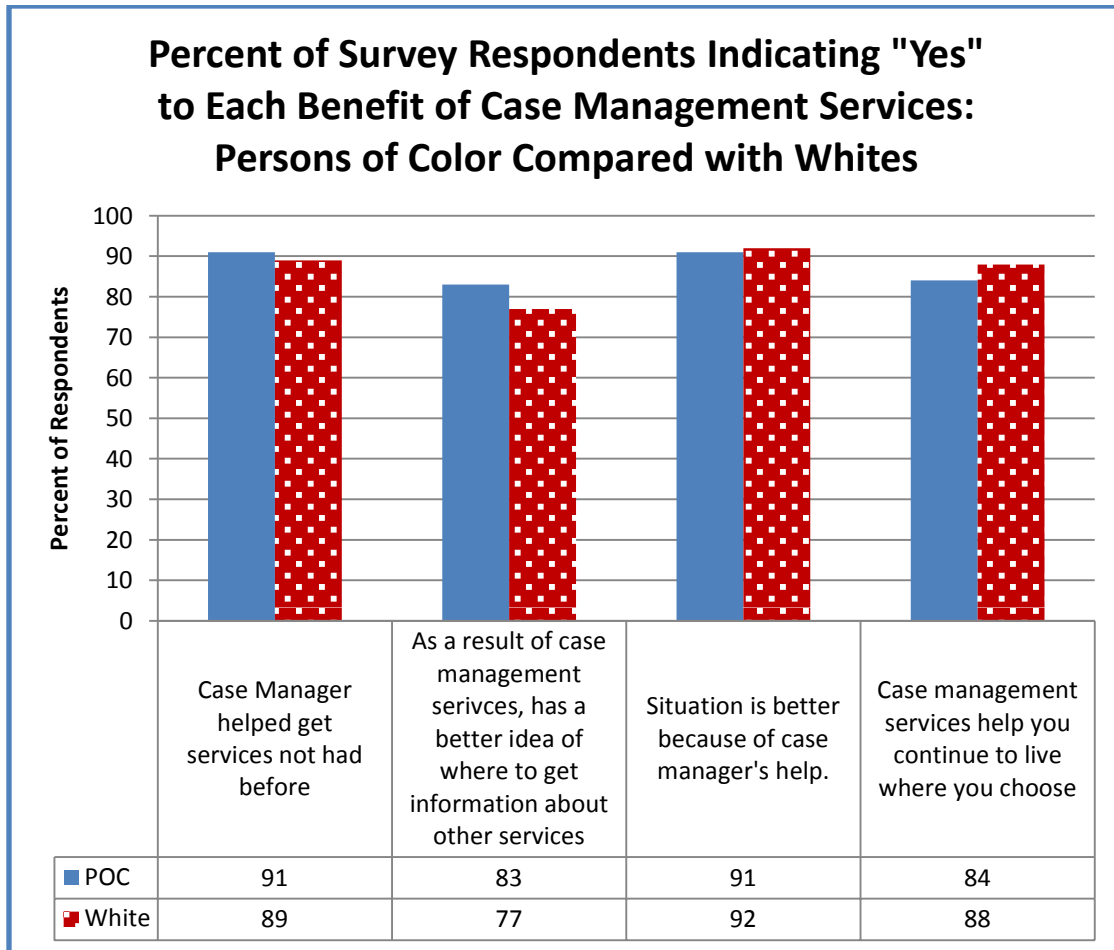
<sup>41</sup>  $\chi^2=0.084251$ ,  $df=1$ ,  $p<.05$ .

<sup>42</sup>  $\chi^2=0.359702$ ,  $df=1$ ,  $p<.05$ .

<sup>43</sup>  $\chi^2=0.006768$ ,  $df=1$ ,  $p<.05$ .

<sup>44</sup>  $\chi^2=0.23682$ ,  $df=1$ ,  $p<.05$ .

**Graph 11:** Comparison of Responses to Items Related to Benefits of Case Management Services for People of Color and Whites



N for people of color = 22 for services, 23 for better idea about information, 23 for situation, and 19 for continuing to live where choose. N for Whites = 234 for services, 254 for better idea about information, 256 for situation, and 236 for continuing to live where choose.

# Recommendations for Improvement

The survey had a free-form question that asked, "What recommendations do you have for improving case management services?" Of the 144 respondents to this question, 35% (51) indicated they had no recommendations for improvement and another 34% (49) had praise for the service and/or case manager as seen in the following:

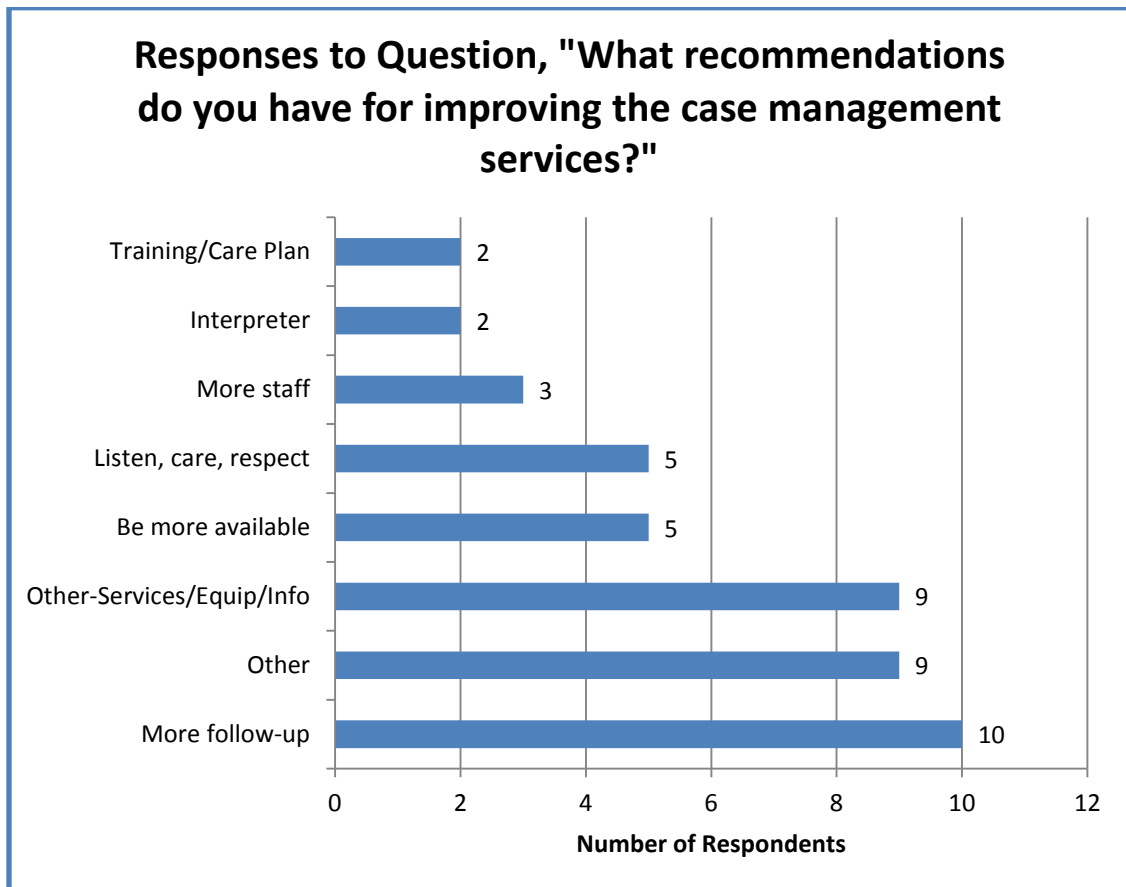
- *Wonderful service.*
- *She does a totally thorough job and respects my needs.*
- *None. I really appreciate all of the help that I've been given so far and feel fortunate to have Joel helping me.*
- *Clone Melissa. No need for improvement.*

One lighthearted comment was, "I'd like brownies (delivered)" says my mother - jokingly!

Responses for the remaining comments were grouped in one of 8 categories as seen in Graph 12.

The category of Interpreter included the comment, "A bilingual, Eng./Span. case manager would help the expanding senior population (Hispanic) in the Sun Prairie area."

**Graph 12:** Grouped Responses to Survey Question "What recommendations do you have for improving the case management services?"



The category of More Follow-up includes persons who wanted more timely return of phone calls and e-mails (3), better and consistent follow-up (4), follow-through (1), and updating needs and services (2).

Respondents who indicated they wanted their case manager to be more available, frequently indicated they wanted more contact (3). One other person in this category commented, *"Be more available - she seems busy @ times and I have to reschedule my visit or trip."*

Other – Services/Equipment/Information included respondents who cited a need for additional services (6), such as help with raking leaves; help with utility bills, rent, and food; legal help; a good, reliable house cleaning service; physical therapy; and a health coach. This category also included respondents who wanted more information on other services (2) or who had equipment needs (1).

A couple of the comments in the category of Listen, Care, Respect included:

*Spend more time developing rapport and listening w/accuracy and checking to see if what was heard was correct.*

*Have someone who cares. I've been trying to get help since May and only received it 4 weeks ago and I still need more help.*

# Results by Contracted Agency

The following section of the report presents the findings for each contracted agency – this includes all useable returned surveys. All data are based on percentages of survey respondents for each question. Caution should be used when comparing agencies due to the small number of responses for some.

Agency	Number of Survey Respondents to Question	Avg. Number of Services Coordinated Per Survey Respondent	Q1. Which services does your case manager help to coordinate for you? (Check all that apply). Percentage of respondents for whom service is coordinated.				
			Adult Day Services	Energy Assistance	Food Assistance/ Food Stamps	Home Chore Services	Home-Delivered Meals
Colonial Club Senior Activity Center	36	2.7	11	19	22	19	44
DeForest Area Community & Senior Center	25	4.0	24	52	36	28	32
East Madison/Monona Coalition	38	4.0	8	39	47	63	26
Fitchburg Senior Center	16	2.6	19	0	13	19	44
McFarland Senior Outreach Services	23	2.8	4	30	48	4	39
Middleton Senior Center	18	3.2	17	22	44	22	22
North/Eastside Senior Coalition	36	3.3	17	19	31	36	14
Northwest Dane Senior Services	16	3.6	31	19	25	19	38
Oregon Area Senior Center	32	2.7	13	9	9	6	47
South Madison Coalition of the Elderly	25	3.3	16	16	36	40	20
Southwest Dane Senior Outreach	18	3.3	17	39	28	33	44
Stoughton Area Senior Center	36	3.3	3	33	31	28	42
Sugar River Senior Center	10	2.6	0	30	20	20	50
Waunakee Senior Center	58	2.4	7	21	21	5	38
West Madison Senior Coalition	48	2.9	8	21	33	38	21

Agency	Number of Survey Respondents to Question	(Q1. Continued) Which services does your case manager help to coordinate for you? (Check all that apply). Percentage of respondents for whom service is coordinated.					
		Homemaker/ Housekeeper	Housing Assistance	Legal Assistance	Medicare/ Medicaid/ Medicare Part D (Drug)	Medical Equipment	Medication Management
Colonial Club Senior Activity Center	36	6	19	8	53	17	3
DeForest Area Community & Senior Center	25	0	0	36	60	44	20
East Madison/Monona Coalition	38	18	26	16	53	37	11
Fitchburg Senior Center	16	5	13	31	13	25	13
McFarland Senior Outreach Services	23	0	13	17	57	22	9
Middleton Senior Center	18	11	17	6	61	33	6
North/Eastside Senior Coalition	36	14	31	17	42	22	8
Northwest Dane Senior Services	16	19	13	6	63	25	25
Oregon Area Senior Center	32	3	9	16	47	44	9
South Madison Coalition of the Elderly	25	24	24	12	48	12	16
Southwest Dane Senior Outreach	18	17	6	17	22	39	11
Stoughton Area Senior Center	36	11	11	17	47	47	3
Sugar River Senior Center	10	10	0	30	20	30	0
Waunakee Senior Center	58	3	3	10	57	26	10
West Madison Senior Coalition	48	15	19	8	35	19	15

Agency	Number of Survey Respondents to Question	(Q1. Continued) Which services does your case manager help to coordinate for you? (Check all that apply). Percentage of respondents for whom service is coordinated.		
		Personal Care Services	Transportation	Other
Colonial Club Senior Activity Center	36	11	17	19
DeForest Area Community & Senior Center	25	28	36	4
East Madison/Monona Coalition	38	13	18	26
Fitchburg Senior Center	16	13	44	13
McFarland Senior Outreach Services	23	4	17	17
Middleton Senior Center	18	17	39	11
North/Eastside Senior Coalition	36	17	33	25
Northwest Dane Senior Services	16	25	31	19
Oregon Area Senior Center	32	16	25	13
South Madison Coalition of the Elderly	25	4	52	12
Southwest Dane Senior Outreach	18	17	28	17
Stoughton Area Senior Center	36	22	22	8
Sugar River Senior Center	10	10	20	20
Waunakee Senior Center	58	17	16	10
West Madison Senior Coalition	48	13	27	21

Agency	Q2. Do you know how to contact your case manager when you need to?				Q3. Does your case manager <b>return</b> your <b>phone calls</b> in a timely manner?			
	Yes	No	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
<b>Overall</b>	<b>97.5</b>	<b>2.5</b>	<b>400</b>		<b>92.4</b>	<b>3.2</b>	<b>4.4</b>	<b>433</b>
Colonial Club Senior Activity Center	97.1	2.9	35		81.1	8.1	1.1	37
DeForest Area Community & Senior Center	95.5	4.5	22		100.0	0.0	0.0	22
East Madison/Monona Coalition	100.0	0.0	33		97.2	0.0	2.8	36
Fitchburg Senior Center	92.9	7.1	14		88.2	5.9	5.9	17
McFarland Senior Outreach Services	95.8	4.2	24		92.0	4.0	4.0	25
Middleton Senior Center	100.0	0.0	16		93.8	0.0	6.3	16
North/Eastside Senior Coalition	97.1	2.9	34		83.8	8.1	8.1	37
Northwest Dane Senior Services	100.0	0.0	15		88.9	0.0	11.1	18
Oregon Area Senior Center	100.0	0.0	25		100.0	0.0	0.0	29
South Madison Coalition of the Elderly	92.6	7.4	27		85.7	3.6	10.7	28
Southwest Dane Senior Outreach	100.0	0.0	17		100.0	0.0	0.0	16
Stoughton Area Senior Center	96.8	3.2	31		100.0	0.0	0.0	34
Sugar River Senior Center	90.0	10.0	10		72.7	27.3	0.0	11
Waunakee Senior Center	100.0	0.0	52		96.4	1.8	1.8	56
West Madison Senior Coalition	97.8	2.2	45		93.6	2.1	4.3	47



Agency	Q4. Does your case manager <b>explain</b> your <b>services</b> in a way you can understand?					Q5. Does your case manager <b>treat</b> you with respect?			
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
<b>Overall</b>	<b>95.5</b>	<b>2.3</b>	<b>2.3</b>	<b>440</b>		<b>96.4</b>	<b>1.4</b>	<b>2.3</b>	<b>441</b>
Colonial Club Senior Activity Center	94.6	5.4	0.0	37		94.6	0.0	5.4	37
DeForest Area Community & Senior Center	96.0	0.0	4.0	25		100.0	0.0	0.0	26
East Madison/Monona Coalition	100.0	0.0	0.0	38		97.4	2.6	0.0	38
Fitchburg Senior Center	87.5	12.5	0.0	16		88.2	5.9	0.0	17
McFarland Senior Outreach Services	88.5	7.7	3.8	26		95.8	0.0	4.2	24
Middleton Senior Center	100.0	0.0	0.0	18		100.0	0.0	0.0	17
North/Eastside Senior Coalition	92.1	0.0	7.9	38		94.6	0.0	5.4	37
Northwest Dane Senior Services	94.1	0.0	5.9	17		94.1	0.0	5.9	17
Oregon Area Senior Center	100.0	0.0	0.0	31		100.0	0.0	0.0	31
South Madison Coalition of the Elderly	93.1	0.0	6.9	29		89.7	0.0	10.3	29
Southwest Dane Senior Outreach	100.0	0.0	0.0	15		100.0	0.0	0.0	16
Stoughton Area Senior Center	97.1	2.9	0.0	35		100.0	0.0	0.0	35
Sugar River Senior Center	81.8	9.1	9.1	11		90.9	9.1	0.0	11
Waunakee Senior Center	96.5	1.8	1.8	57		96.6	1.7	1.7	58
West Madison Senior Coalition	97.9	2.1	0.0	47		97.9	2.1	0.0	48

Agency	Q6. Does your case manager <b>involve you</b> in discussing and planning your services?					Q7. Does your case manager do a good job <b>setting up services</b> (transportation, meals, medical appointments, etc.) for you?			
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
<b>Overall</b>	<b>91.6</b>	<b>4.7</b>	<b>3.7</b>	<b>428</b>		<b>82.6</b>	<b>6.5</b>	<b>10.9</b>	<b>384</b>
Colonial Club Senior Activity Center	83.8	13.5	2.7	37		84.8	9.1	6.1	33
DeForest Area Community & Senior Center	92.3	3.8	3.8	26		90.5	4.8	4.8	21
East Madison/Monona Coalition	94.6	0.0	5.4	37		79.4	17.6	2.9	34
Fitchburg Senior Center	75.0	12.5	12.5	16		81.3	12.5	6.3	16
McFarland Senior Outreach Services	95.7	0.0	4.3	23		77.3	0.0	22.7	22
Middleton Senior Center	93.8	0.0	6.3	16		86.7	0.0	13.3	16
North/Eastside Senior Coalition	86.5	5.4	8.1	37		72.7	3.0	24.2	33
Northwest Dane Senior Services	93.8	0.0	6.3	16		82.4	0.0	17.6	17
Oregon Area Senior Center	100.0	0.0	0.0	30		89.7	3.4	6.9	29
South Madison Coalition of the Elderly	86.2	6.9	6.9	29		76.9	3.8	19.2	26
Southwest Dane Senior Outreach	92.9	0.0	7.1	14		83.3	8.3	8.3	12
Stoughton Area Senior Center	100.0	0.0	0.0	34		93.5	0.0	6.5	31
Sugar River Senior Center	80.0	20.0	0.0	10		66.7	22.2	11.1	9
Waunakee Senior Center	94.5	5.5	0.0	55		81.6	6.1	12.2	49
West Madison Senior Coalition	91.7	6.3	2.1	48		83.8	10.8	5.4	37

Agency	Q8. Does your case manager help you get services that you did not have before?					Q9. Did your case manager develop a care plan for the services you need? (A care plan is a document that contains information about who saw you, your needs, the kinds of services you receive, and how you are doing once you receive the services.)			
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
<b>Overall</b>	<b>81.0</b>	<b>9.7</b>	<b>9.2</b>	<b>401</b>		<b>53.7</b>	<b>18.8</b>	<b>27.4</b>	<b>361</b>
Colonial Club Senior Activity Center	72.2	11.1	16.7	36		61.8	17.6	20.6	34
DeForest Area Community & Senior Center	84.0	8.0	8.0	25		75.0	10.0	15.0	20
East Madison/Monona Coalition	88.2	8.8	2.9	34		56.3	25.0	18.8	32
Fitchburg Senior Center	66.7	13.3	20.0	15		33.3	33.3	33.3	12
McFarland Senior Outreach Services	70.8	16.7	12.5	24		45.8	20.8	33.3	24
Middleton Senior Center	88.9	11.1	0.0	18		40.0	26.7	33.3	15
North/Eastside Senior Coalition	78.8	9.1	12.1	33		57.6	15.2	27.3	33
Northwest Dane Senior Services	75.0	12.5	12.5	16		60.0	6.7	33.3	15
Oregon Area Senior Center	89.3	3.6	7.1	28		63.6	9.1	27.3	22
South Madison Coalition of the Elderly	75.0	7.1	17.9	28		48.0	4.0	48.0	25
Southwest Dane Senior Outreach	92.9	7.1	0.0	14		63.6	18.2	18.2	11
Stoughton Area Senior Center	87.1	6.5	6.5	31		55.2	20.7	24.1	29
Sugar River Senior Center	50.0	25.0	25.0	8		25.0	37.5	37.5	8
Waunakee Senior Center	81.6	10.2	8.2	49		47.5	30.0	22.5	40
West Madison Senior Coalition	88.1	9.5	2.4	42		51.2	17.1	31.7	41

Agency	Q10. Did you receive a copy of the care plan?					Q11. Are you able to select the services you receive?		
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Number of Survey Respondents
<b>Overall</b>	<b>39.7</b>	<b>36.6</b>	<b>23.7</b>	<b>350</b>		<b>93.5</b>	<b>6.5</b>	<b>367</b>
Colonial Club Senior Activity Center	47.1	26.5	26.5	34		89.3	10.7	28
DeForest Area Community & Senior Center	57.9	21.1	21.1	19		95.7	4.3	23
East Madison/Monona Coalition	42.4	33.3	24.2	33		100.0	0.0	34
Fitchburg Senior Center	7.7	69.2	23.1	13		81.8	18.2	11
McFarland Senior Outreach Services	42.1	42.1	15.8	19		90.9	9.1	22
Middleton Senior Center	35.7	50.0	14.3	14		73.3	26.7	15
North/Eastside Senior Coalition	33.3	40.0	26.7	30		97.0	3.0	33
Northwest Dane Senior Services	43.8	18.8	37.5	16		100.0	0.0	16
Oregon Area Senior Center	45.0	30.0	25.0	20		100.0	0.0	25
South Madison Coalition of the Elderly	45.8	25.0	29.2	24		92.0	8.0	25
Southwest Dane Senior Outreach	33.3	41.7	25.0	12		100.0	0.0	11
Stoughton Area Senior Center	37.9	37.9	24.1	29		96.9	3.1	32
Sugar River Senior Center	25.0	62.5	12.5	8		83.3	16.7	6
Waunakee Senior Center	42.5	40.0	17.5	40		93.5	6.5	46
West Madison Senior Coalition	33.3	41.0	25.6	39		90.0	10.0	40

Agency	Q12. As a result of receiving the case management services, do you have a better idea of where to get information about other services?				Q13. Is your situation better because of your case manager's help?		
	Yes	No	Number of Survey Respondents		Yes	No	Number of Survey Respondents
<b>Overall</b>	<b>79.1</b>	<b>20.9</b>	<b>406</b>		<b>92.2</b>	<b>7.8</b>	<b>410</b>
Colonial Club Senior Activity Center	80.0	20.0	35		88.9	11.1	36
DeForest Area Community & Senior Center	88.0	12.0	25		96.0	4.0	25
East Madison/Monona Coalition	77.8	22.2	36		88.6	11.4	35
Fitchburg Senior Center	60.0	40.0	15		80.0	20.0	15
McFarland Senior Outreach Services	68.2	31.8	22		89.5	10.5	19
Middleton Senior Center	75.0	25.0	16		100.0	0.0	15
North/Eastside Senior Coalition	77.1	22.9	35		88.6	11.4	35
Northwest Dane Senior Services	81.3	18.8	16		87.5	12.5	16
Oregon Area Senior Center	93.3	6.7	30		100.0	0.0	31
South Madison Coalition of the Elderly	76.9	23.1	26		96.3	3.7	27
Southwest Dane Senior Outreach	84.6	15.4	13		92.9	7.1	14
Stoughton Area Senior Center	84.4	15.6	32		100.0	0.0	33
Sugar River Senior Center	50.0	50.0	6		42.9	57.1	7
Waunakee Senior Center	87.0	13.0	54		96.3	3.7	54
West Madison Senior Coalition	68.9	31.1	45		91.7	8.3	48

Agency	Q15. Are you satisfied with the case management services you receive?				Q16. Do the case management services help you continue to live where you choose?		
	Yes	No	Number of Survey Respondents		Yes	No	Number of Survey Respondents
<b>Overall</b>	<b>93.9</b>	<b>5.9</b>	<b>424</b>		<b>88.2</b>	<b>11.8</b>	<b>373</b>
Colonial Club Senior Activity Center	86.5	13.5	37		87.9	12.1	33
DeForest Area Community & Senior Center	96.2	3.8	26		95.8	4.2	24
East Madison/Monona Coalition	94.3	5.7	35		93.5	6.5	31
Fitchburg Senior Center	81.3	18.8	16		66.7	33.3	15
McFarland Senior Outreach Services	90.5	9.5	21		89.5	10.5	19
Middleton Senior Center	94.1	5.9	17		87.5	12.5	16
North/Eastside Senior Coalition	91.9	8.1	37		93.8	6.3	32
Northwest Dane Senior Services	100.0	0.0	17		100.0	0.0	12
Oregon Area Senior Center	100.0	0.0	31		92.3	7.7	26
South Madison Coalition of the Elderly	89.7	10.3	29		88.5	11.5	26
Southwest Dane Senior Outreach	100.0	0.0	14		100.0	0.0	12
Stoughton Area Senior Center	100.0	0.0	35		81.5	18.5	27
Sugar River Senior Center	71.4	28.6	7		75.0	25.0	8
Waunakee Senior Center	98.2	1.8	57		87.8	12.2	49
West Madison Senior Coalition	95.6	4.4	45		81.4	18.6	43

Agency	Q.17 How would you rate the overall quality of the case management services you have received? Would you say.... (Percent)					
	Excellent	Very Good	Good	Fair	Poor	Number of Survey Respondents
<b>Overall</b>	<b>61.6</b>	<b>24.8</b>	<b>7.6</b>	<b>1.4</b>	<b>4.4</b>	<b>432<sup>45</sup></b>
Colonial Club Senior Activity Center	57.9	23.7	5.3	2.6	7.9	38 <sup>46</sup>
DeForest Area Community & Senior Center	76.0	20.0	4.0	0.0	0.0	25
East Madison/Monona Coalition	58.3	33.3	2.8	0.0	5.6	36
Fitchburg Senior Center	43.8	25.0	18.8	0.0	12.5	16
McFarland Senior Outreach Services	60.9	26.1	4.3	0.0	8.7	23
Middleton Senior Center	58.8	23.5	11.8	5.9	0.0	17
North/Eastside Senior Coalition	51.4	27.0	13.5	0.0	8.1	37
Northwest Dane Senior Services	66.7	33.3	0.0	0.0	0.0	18
Oregon Area Senior Center	87.1	12.9	0.0	0.0	0.0	31
South Madison Coalition of the Elderly	55.2	20.7	10.3	3.4	10.3	29
Southwest Dane Senior Outreach	57.1	21.4	21.4	0.0	0.0	14
Stoughton Area Senior Center	62.9	31.4	2.9	0.0	2.9	35
Sugar River Senior Center	44.4	11.1	22.2	11.1	11.1	9
Waunakee Senior Center	66.7	22.8	7.0	1.8	1.8	57
West Madison Senior Coalition	57.4	27.7	10.6	2.1	2.1	47

<sup>45</sup> One respondent indicated between Very Good and Good.

<sup>46</sup> One respondent indicated between Very Good and Good.

Agency	Q12. What recommendations do you have for improving the case management services? (Free-form narrative classified into categories of responses.)						
	Total Number of Recommendations	Be more available	Follow-up	Listen, care, respect	Interpreter	More staff, more time	Other – Services/ Equipment/ Information
Colonial Club Senior Activity Center	13	1	4		1	2	3
DeForest Area Community & Senior Center	3	1				1	1
East Madison/Monona Coalition	6		2	2			1
Fitchburg Senior Center	2			1			
McFarland Senior Outreach Services	1					1	
Middleton Senior Center	4	1	1		1		
North/Eastside Senior Coalition	6		1			1	3
Northwest Dane Senior Services	2	1					
Oregon Area Senior Center	1					1	
South Madison Coalition of the Elderly	6		3	1			1
Southwest Dane Senior Outreach	0						
Stoughton Area Senior Center	2	1					1
Sugar River Senior Center	3		1				
Waukegan Senior Center	3					1	
West Madison Senior Coalition	7	1		1		1	2



Agency	Q12. What recommendations do you have for improving the case management services? (Free-form narrative classified into categories of responses.)	
	Other	Training/Care Plan
Colonial Club Senior Activity Center	1	1
DeForest Area Community & Senior Center		
East Madison/Monona Coalition	1	
Fitchburg Senior Center	1	
McFarland Senior Outreach Services		
Middleton Senior Center	1	
North/Eastside Senior Coalition	1	
Northwest Dane Senior Services	1	
Oregon Area Senior Center		
South Madison Coalition of the Elderly	1	
Southwest Dane Senior Outreach		
Stoughton Area Senior Center		
Sugar River Senior Center	2	
Waunakee Senior Center	1	1
West Madison Senior Coalition	1	1



## **Appendix A: Survey Instrument**



# Case Management Survey

**Introduction:** We need your help! Dane County Department of Human Services is always interested in improving the services we help to fund. We would like to know what you think about the case management services you have received this year from «**Provider**» that were provided by «**Name\_of\_Case\_Manager\_First\_Name\_Last\_N**». Your case manager is the person who helps to coordinate services, such as transportation, personal care services, home delivered meals, and more for you.

This survey is completely confidential. You do not have to complete it if you don't want to, but we hope you will help us out. How you answer the questions will not impact your services in any way. The results of this survey will be released in aggregate form only. That means your answers will be grouped together with those of other people who have responded to this survey.

Please return your completed survey in the enclosed, postage paid envelope no later than **Monday, November 7, 2016**.

**1. Which services does your case manager help to coordinate for you?  
(Check all that apply)**

		YES	
a.	Adult Day Services	<input type="checkbox"/>	1
b.	Energy Assistance	<input type="checkbox"/>	1
c.	Food Assistance/Food Stamps/SNAP	<input type="checkbox"/>	1
d.	Home Chore Services	<input type="checkbox"/>	1
e.	Home-Delivered Meals	<input type="checkbox"/>	1
f.	Homemaker / Housekeeper	<input type="checkbox"/>	1
g.	Housing Assistance	<input type="checkbox"/>	1
h.	Legal Assistance	<input type="checkbox"/>	1
i.	Medicare / Medicaid / Medicare Part D (Drug)	<input type="checkbox"/>	1
j.	Medical Equipment (wheelchair, walker, etc.)	<input type="checkbox"/>	1
k.	Medication Management	<input type="checkbox"/>	1
l.	Personal Care Services.	<input type="checkbox"/>	1
m.	Transportation	<input type="checkbox"/>	1
n.	Other	<input type="checkbox"/>	1
	<b>List:</b> _____		

**2. Do you know how to contact your case manager when you need to?**

Yes..... ☐ 1  
 No..... ☐ 2

		Yes	No	Don't Know
<b>3.</b>	Does your case manager <b>return</b> your <b>phone calls</b> in a timely manner?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
<b>4.</b>	Does your case manager <b>explain</b> your <b>services</b> in a way you can understand?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
<b>5.</b>	Does your case manager <b>treat</b> you with respect?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
<b>6.</b>	Does your case manager <b>involve you</b> in discussing and planning your services?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
<b>7.</b>	Does your case manager do a good job <b>setting up services</b> (transportation, meals, medical appointments, etc.) for you?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
<b>8.</b>	Does your case manager help <b>you get services</b> that you did not have before?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3

**9. Did your case manager develop a care plan for the services you need? (A care plan is a document that contains information about who saw you, your needs, the kinds of services you receive, and how you are doing once you receive the services.)**

Yes..... ☐ 1  
 No..... ☐ 2  
 Don't know..... ☐ 3

**10. Did you receive a copy of the care plan?**

Yes..... ☐ 1  
 No..... ☐ 2  
 Don't know..... ☐ 3

**11. Are you able to select the services you receive?**

Yes..... ☐ 1  
 No..... ☐ 2

**12. As a result of receiving the case management services, do you have a better idea of where to get information about other services?**

Yes..... ☐ 1  
No..... ☐ 2

**13. Is your situation better because of your case manager's help?**

Yes..... ☐ 1  
No..... ☐ 2

**14. What recommendations do you have for improving the case management services?**

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**15. Are you satisfied with the case management services you receive?**

Yes..... ☐ 1  
No..... ☐ 2

**16. Do the case management services help you continue to live where you choose?**

Yes..... ☐ 1  
No..... ☐ 2

**17. How would you rate the overall quality of the case management services you have received? Would you say....**

Excellent..... ☐ 1  
Very Good..... ☐ 2  
Good..... ☐ 3  
Fair..... ☐ 4  
Poor..... ☐ 5

**18. Please use the space below for any other comments you have about your case manager or case management services.**

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**19. Did you complete this survey on your own or did someone help you?**

- |  |                          |   |
|--|--------------------------|---|
| I completed this on my own.....            | <input type="checkbox"/> | 1 |
| Someone helped me complete the survey..... | <input type="checkbox"/> | 2 |

**Thank you for taking the time to complete this survey!** Please return it in the enclosed envelope to:

Dane County Department of Human Services  
1202 Northport DR/4<sup>th</sup> FL  
Madison, WI 53704

Survey No. «Survey\_No»

Consumer Survey 2016 – AAA Case Management – Results.docx