City of Madison
Community Development Division
Older Adult Services
2024 Policy Paper

I.   Introduction

This policy paper describes the proposed 2024 conceptual framework that will guide the use of City of Madison Community Development Division funding for Older Adult Services beginning in 2025.

The Community Development Division (CDD) of the City of Madison strives to create the necessary conditions for older adults in Madison to age successfully. Encompassed within the goal of ensuring that "*Individuals and families at-risk or in crisis can access services to meet immediate and/or basic needs*" is the desire to see that older adults have services and activities that can help them avoid disease and disability, maintain high physical and cognitive function, and reduce social isolation.

This policy paper describes the proposed conceptual framework and the desired elements of programming that will be supported during 2025-2028 by City of Madison Community Development Division funding for Older Adult Services. It specifically targets adults, aged 55 or older, who reside in the City of Madison. In allocating funds for older adult services, the City's goal is to ensure that services reach a more diverse population of older adults including, for example, historically marginalized groups such as BIPOC, LGBTQIA+, and Limited English Proficient (LPE) identifying individuals.

II.   Background

Every state and community in the U.S. is aging. By 2030 there will be 73 million Americans over 65. There will be more people over 65 than under 18[1]. People are living longer and staying active longer and our community needs to adjust to meet those needs. To better ensure the alignment of Older Adult Services with the needs of Madison residents, it is important to understand the historical context and methodologies within past funding processes, current funding allocations, and community outreach efforts. This section outlines key components of the background and methodology, laying the foundation for future funding approaches in the City of Madison.

2016: Older Adult Services Funding Process + Forward Community Investment Analysis
The most recent funding process for Older Adult Services took place in 2016. It was the first funding process following the analysis of CDD's funding practices conducted by Forward Community Investments. Within the report, Older adult services are rooted in community goal III.

> Community Goal III*: Resident and community wellbeing through individual, family, and household stabilization and equitable access to resources—**connect vulnerable and marginalized residents with resources designed to avoid homelessness or other crisis situations, promote household stability, and maintain personal independence.**

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[1] U.S. Census Bureau. (2022, February 25). *2020 census will help policymakers prepare for the incoming wave of aging boomers*. Census.gov. https://www.census.gov/library/stories/2019/12/by-2030-all-baby-boomers-will-be-age-65-or-older.html

Furthermore, the report highlights necessary conditions for success to reach this goal and calls for CDD to fund initiatives that serve low-income individuals, residents of color, and vulnerable populations, and are designed to be culturally and linguistically responsive to residents.

2020-Present: COVID-19

The COVID-19 pandemic significantly impacted older adults, magnifying existing vulnerabilities and presenting unprecedented challenges[2]. This crisis resulted in severe health consequences within this demographic, including heightened infection rates, hospitalizations, and mortality compared to other age groups. Moreover, measures like social distancing and lockdowns, implemented to mitigate virus transmission, have intensified feelings of isolation and loneliness among older adults, exacerbating mental health concerns. Disruptions to access essential services and support systems have further compounded the difficulties faced by older adults during this period. The pandemic has underscored the critical need for robust and flexible older adult services, emphasizing the necessity for ongoing investment and strategic planning to address the evolving needs of this population in Madison.

2019-2024: Age Friendly Madison

Beginning in 2019, the Age Friendly Communities initiative began a collaborative effort between the City, County, and AARP as part of the larger AARP Livable Communities initiative which supports the efforts of neighborhoods, towns, cities and rural areas to support healthy and successful aging around 8 domains of aging[3]. This involved forming a steering committee and engaging in extensive community outreach (2021) and culminated in a comprehensive final infographic[4]. This infographic highlights the needs and wants of older adults in Madison and serves as a foundational document, offering critical insights and recommendations for policymakers and future endeavors.

2023: 7.5% Increase to Current Contracts

In 2023, the Common Council increased City funding for older adult services by 7.5% as part of the City's 2024 Adopted Operating Budget. That increased available funds to $838,039. For 2024, the added funding is being used to increase existing provider contracts. Provided the Council preserves the increase in the 2025 Operating Budget, these funds will be included in those to be allocated in the upcoming RFP process for contracts beginning in 2025.

2024: Community, Older adult, Advocacy, Learning, Equity, Support, Communication, Engagement – COALESCE Cohort

COALESCE is a cohort of service providers that receive city funds through older adult services funding. This workgroup aims to facilitate stronger partnerships and communication channels among agencies that receive city funds. This cohort also aims to develop effective and relevant solutions that address the unique needs of diverse older adult communities in Madison.

Agencies within COALESCE are expected to work collaboratively with a diverse base of local partners in understanding current resources for supporting older adults and develop prevention strategies, identify gaps and needs, and create local solutions.

2024: Piloting Equity Priority Areas – Older Adults

One of the challenges that many older adults face in accessing services is the lack of mobility. It raises the question of whether some services might be more effectively delivered if they focus on

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[2] Lee, Y. J. (2020). The Impact of the COVID-19 Pandemic on Vulnerable Older Adults in the United States. Journal of Gerontological Social Work, 63(6–7), 559–564. https://doi.org/10.1080/01634372.2020.1777240

[3] 1. Housing, 2. Transportation, 3. Communication & Information, 4. Respect & Social Inclusion, 5. Social Participation, 6. Civic Participation & Employment, 7. Health Services & Community Supports, and 8. Outdoor Spaces & Buildings

areas of the city in which there are high concentrations of older adults. A City's "Data Team", housed within the Finance Department, explored this issue utilizing data from the Census and the American Community Survey (ACS) through the US Government's Census Bureau. The team generated a detailed map to identify "equity priority areas", that is, census blocks within Madison with higher proportions of Black, Indigenous, People of Color (BIPOC), and low-income older adults. The map incorporates key data, such as age (65+), race/ethnicity, median income, percentage of households above the poverty line, and the prevalence of English-speaking households. It suggests there may be areas in Madison where a more geographically focused approach to service delivery could be considered.
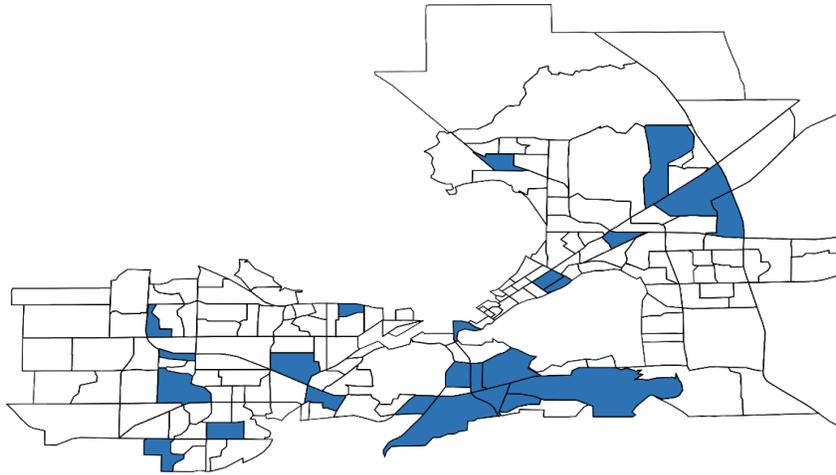

Figure 1 - Map of Madison - Equity Priority Areas in Blue

Table 1 – Areas of Madison and neighborhoods near equity priority areas

West	Southwest	Near West	South
• Walnut Grove • Oakbridge Condominiums • Midvale Heights	• Allied • NewBerry Heights • HighPoint Estates • Maple-Prairie • Glacier Ridge	• Rocky Bluff	• Bridge-Lakepoint • Brams Addition • Burr Oaks • Leopold • Indian Springs • Moorland-Rimrock
Downtown	**Near East**	**North**	**Northeast**
• Capitol Neighborhoods • Monona Bay • Near Brittingham Apartments	• Sherman Terrace • Eken Park • Worthington • Marquette	• Kennedy Heights • Vera Court	• Westchester Gardens • Norman Acres • Ridgewood

In figure 1 above, the equity priority areas are highlighted in blue. These segments of the city underscore where CDD calls agencies to deliver targeted and localized services and programming. There are scatterings, or clusters, throughout Madison. Understanding that communities and neighborhoods exist beyond the confines of census blocks, table 1 provides more context and delineates specific neighborhoods, or residential spaces, that reside within, or near, equity priority areas. No dataset is flawless, and it's important to acknowledge that real-world complexities often blur categorical boundaries. CDD simply encourages agencies to use this map as a tool as they

articulate their capacity to serve diverse communities across the city, while recognizing the nuanced needs of communities.

An Invite to Place-based Initiatives

Place-based initiatives generally refer to those in which programs, services, or interventions focus on the unique needs and characteristics of specific geographic areas, such as neighborhoods or communities. These initiatives aim to improve outcomes by tailoring interventions to the particular assets, challenges, and opportunities present in each location.[5] Transportation is a historically cited barrier to accessing services for older adults. Therefore, CDD seeks to ask our partners to reimagine older adult services in the City of Madison. Through strategic collaboration and partnership between city-supported neighborhood centers, Senior Housing developments, and other agencies that serve older adults (COALESCE), there may be opportunities to develop a network of support that transcends traditional organizational boundaries and fosters a responsive ecosystem of care for older adults[6]. Table 2 lists the 15 City-supported neighborhood centers in Madison. Figure 2 shows their locations in relation to the previously identified equity priority areas. Several of them already devote resources to older adult programming but, through collaborations with other agencies, it may be possible to expand the capacity to serve more older adults within their own neighborhoods.

Table 2 – List of city-supported neighborhood centers

| City of Madison Neighborhood Centers				
Bayview Foundation	Boys and Girls Club of Dane County - Allied	Boys and Girls Club of Dane County - Flemming	Bridge Lake Point Waunona Neighborhood Center	East Madison Community Center
Elver Park Neighborhood Center	Goodman Community Center	Kennedy Heights Community Center	Lussier Community Education Center	Meadowood Neighborhood Center
Neighborhood House Community Center	Rooted/Badger Rock Neighborhood Center	Theresa Terrace Neighborhood Center	Vera Court Neighborhood Center	Wil-Mar Neighborhood Center
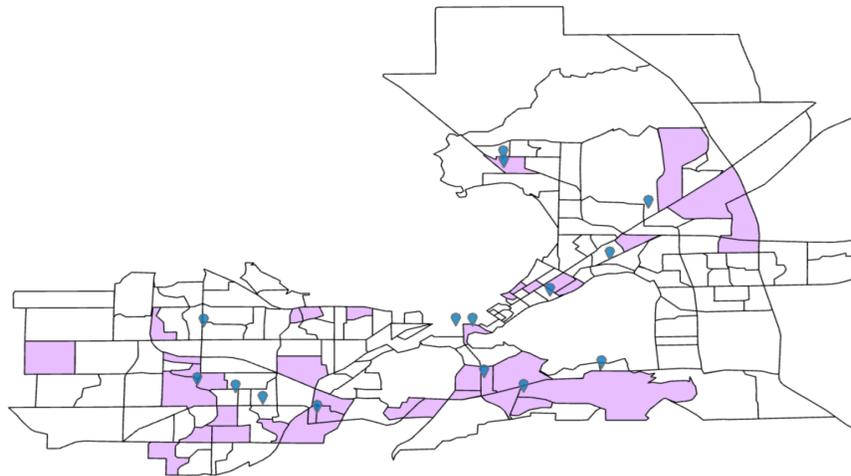
Figure 2 - Equity Priority Areas & City Funded Neighborhood Centers

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[5] Place-based initiatives. Urban Institute. (n.d.). https://www.urban.org/projects/place-based-initiatives#:~:text=Place%2Dbased%20initiatives%20aim%20to,and%20rural%20communities%20experiencing%20disinvestment.

[6] Ewen, H. H., Emerson, K. G., Washington, T. R., Carswell, A. T., & Smith, M. L. (2017). Aging in place: community-based services and resources in residential settings among older adults. *Housing and Society*, *44*(1–2), 114–126. https://doi.org/10.1080/08882746.2017.1389577

2023-2024: EQT By Design Consultancy

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Building on and complementing the work of Age Friendly Communities, the consultant, EQT by Design, conducted a thorough assessment and analysis in 2023 of older adult services in Madison, resulting in their final report in early 2024. EQT surveyed older adults, service providers, and led focus groups to gain insight about the reach, relevance, of current efforts around the city that support older adults in Madison. Detailed findings and recommendations are encapsulated in the EQT by Design report[7], a document that stands as a key reference for ongoing efforts to align Older Adult Services with community needs.

While EQT by Design community outreach highlighted that white, fixed-income, older adults receive high quality services, there is a large portion of our diverse BIPOC, LGBTQIA+, and Limited English Proficient (LEP) older adult population who are not as well connected to services.

Recommendations: EQT by Design brought forth a comprehensive set of findings and recommendations, outlining targeted areas for improvement in the City's approach to older adult services. EQT by Design listed the following items within its final report when providing recommendations to the City.

1. Culturally Relevant Programming
   Advocate for the investment and expansion of programming and services that are culturally relevant to the BIPOC and LGBTQIA+ communities.

2. Staff Diversity
   Prioritize efforts to diversify City and program staff, ensuring representation that better reflects the demographics of the communities served.

3. Leverage BIPOC City Staff
   Actively engage and leverage the expertise and perspectives of BIPOC City staff in the development and implementation of older adult services.

4. Support Providers Serving BIPOC/LGBTQ+
   Provide support to service providers catering to BIPOC and LGBTQ+ communities, recognizing the unique challenges faced by these groups.

5. Transportation Challenges
   Collaborate with relevant stakeholders to help address transportation challenges faced by older adults, emphasizing the importance of a coordinated and comprehensive approach.

6. Language Access
   Invest in language access design and resources to ensure that language is not a barrier for older adults in accessing services.

7. LGBTQIA+ Services
   Commit to continuous learning and growth in providing services that are inclusive and sensitive to the needs of the LGBTQIA+ community.

8. Information Distribution Networks
   Improve information distribution networks to older adults, ensuring that vital information reaches them through accessible and effective channels.

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[7] EQT by Design Final Report

A Note on Data-Driven Policy Development

These most recent findings from EQT by Design, in conjunction with almost a decade's worth of data and insights garnered from previous initiatives, guide City policies and actions as we collectively cultivate a more age-friendly and inclusive community. Beyond a simple summary and timeline of past events, it is important to underscore that these diverse efforts highlighted several recurring themes that resonate across Madison and will be reflected in CDD funding priorities. Chief among these themes is our commitment to reaching a more diverse spectrum of older adults, acknowledging the unique challenges they face. Additionally, our efforts prioritize addressing transportation barriers experienced by certain segments of older adults, particularly within equity priority areas. Also, we recognize the need to address growing cultural and language barriers, ensuring that services are accessible and responsive to the diverse needs of our community. Furthermore, we emphasize the dissemination of relevant information and the facilitation of connections to existing resources, empowering older adults to navigate the support landscape effectively. Lastly, we aim to enhance coordination among service providers, streamlining access to available resources and fostering a more cohesive support network for older adults.

III. Program Areas

The City of Madison's Community Development Division is committed to allocating funding towards a comprehensive array of services tailored to address the diverse needs of older adults across the aging continuum. The aging process unfolds through five distinct stages, each presenting unique challenges and considerations for policy makers. These distinct stages, developed by Dr. Mark Frankel[8], may be further simplified into two main veins of programming priorities through CDD. Firstly, we aim to facilitate successful aging by fostering active engagement within the community through entities such as the Madison Senior Center (MSC) and other Community Based Organizations (CBO), offering a spectrum of enriching activities to help residents age successfully. Secondly, we prioritize providing essential support to individuals facing barriers to participation, including those at risk of isolation or lacking access to necessary resources.
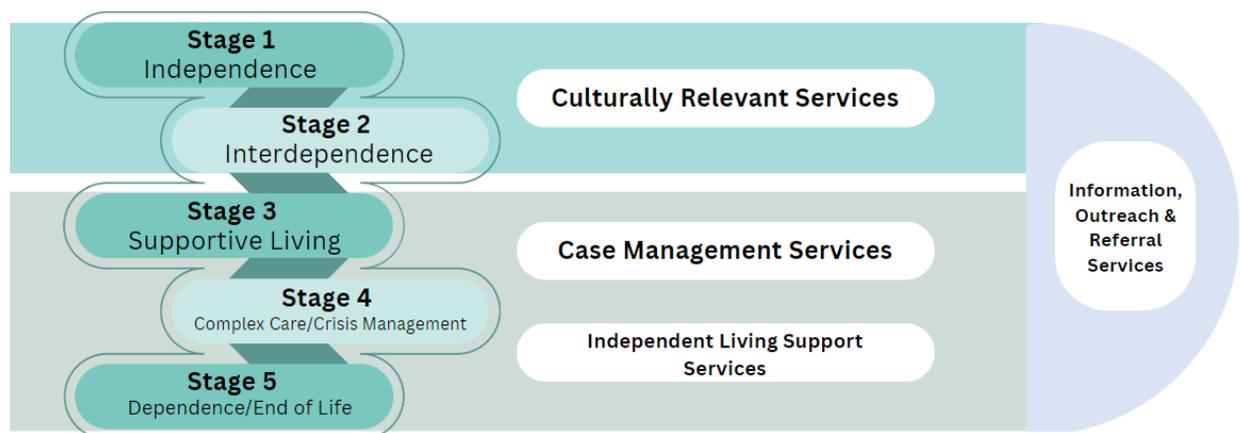

Figure 3- Older Adult Range of Programming

City funding priorities will be strategically aligned with these objectives, ensuring that the programs recommended for funding effectively address the unique challenges faced by older adults, whether

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[8] Senior services - 5 stages of Aging. Available at:
https://www.chicago.gov/content/dam/city/depts/fss/supp_info/SeniorServices/SeniorServicesDivision-BK.pdf

through promoting active lifestyles or delivering vital support services. Information on the specific service areas are as follows:

A. Case Management Services

Case managers serve as advocates, assisting clients in accessing essential resources and coordinating various aspects of their care. Case management Services not only meet immediate needs but also foster long-term stability and empowerment for those facing challenges in our community. The request for proposals process will favor programs that follow providing services consistent with the current standards for case management services as defined in Area Agency on Aging Client Centered Case Management Standards[9]

The target population for Case Management services is higher need older adults. While services are intended for individuals aged 55 and older, emphasis shall be placed on adults 65+, living in their own home or apartment, or with a family member in Madison. Additionally, a particular emphasis shall be placed on serving BIPOC, Limited English Proficient (LEP), low-income, and/or LGBTQIA+ older adults. Agencies seeking funding will need to describe specific and tangible plans for how they will serve these populations. Clients eligible for Targeted Case Management through Medical Assistance or from case management paid for by any waiver program (e.g. Family Care, IRIS, Partnership) are not eligible for case management under this program. Three exceptions are allowed: clients requesting a home-delivered meal assessment or reassessment, Medicare Part D enrollment assistance, and/or referrals from DCDHS Adult Protective Service.

Case management services need to be language accessible, trauma-informed, and culturally competent to adequately serve the needs of individuals of various races, ethnicities, sexual orientations and gender identities. City-supported case management processes will begin with a psychosocial and functional assessment of client needs in areas including, for example, mental health, housing, food and nutrition, eligibility determination, and assistance applying for financial and health care benefits, in-home assistance, family care, Activities of Daily Living (ADLs), and access to culturally appropriate and language accessible older adult activities.

B. Culturally Relevant Services

Investing in Culturally Relevant Services is important to address the varied needs of the Madison community. Through programs that reflect the diverse cultural, ethnic, and linguistic backgrounds of our residents, we create spaces where all individuals feel valued and represented. Allocating resources towards Culturally Relevant Services ensures that programming reflects the unique experiences, traditions, and perspectives of diverse communities in Madison. This includes supporting agencies/programs that promote cultural awareness, celebrate heritage months, and provide platforms for cultural expression and exchange, etc. Beyond mere representation, funding for Culturally Relevant Services signifies a commitment to equity and social justice and acknowledges historical injustices and systemic barriers faced by marginalized communities and ties into the City's mission to establish racial equity and social justice as core principles in all decisions, policies and functions of the City of Madison. Culturally Relevant services aim to address disparities through targeted interventions and support catered to the specific wants, needs, and desires of the targeted population.

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[9] https://aaa.dcdhs.com/pdf/Case%20Management%20%20Presentation.pdf

Older Adult Programs provide a broad range of group and individual activities and programming that respond to the needs and interests of older adults, their families and caregivers. Topic areas may be delivered in a variety of settings and formats including lectures, classes, individual sessions, small group activities and discussions, volunteer activities, online programming and special events. The applicant agency should be prepared to describe a range of programming that addresses these focal areas.

The target population for Culturally Relevant Services is older adults, aged 55 and over, with an emphasis on ensuring access and belonging to BIPOC, Limited English Proficient (LEP), low-income, and/or LGBTQIA+ older adults.

Programs need to be language accessible, culturally responsive to various races, ethnicities, sexual orientations and gender identities and be trauma-informed. They should also align with the framework for Senior Activity Programs adopted by the City's committee on Aging that outlines expectations for a range of activities in the following three areas:

- **Avoiding Disease and Disability**: Some examples: health screenings, wellness education, home safety modification, volunteering, nutrition, falls prevention, caregiving, meditation, shamanism, and/or soul calling ceremonies.
- **Maintaining High Cognitive and Physical Function**: Some examples: physical fitness, gardening, healing groups, exercise, recreation, computer literacy, brain fitness, creative self-expression, volunteerism, health literacy.
- **Engagement with Life**: Some examples: spirituality, field trips, social relationships, friendship development, advocacy, intergenerational and volunteer activities.

C. Outreach, Information, and Referral Services

Outreach, Information, and Referral services play a vital role in connecting individuals with the resources and support they need to address various challenges they may face. The consultant, EQT by Design, made a specific callout for increased information distribution networks. It is paramount that residents have access to accurate information, guidance, and referrals to appropriate services, ranging from healthcare and housing to employment and legal assistance. While United Way funds '2-1-1' and other information and referral services, outreach and survey data reveal that target demographics are still unaware of available supports. Outreach, Information, and Referral services must ensure all community members, especially underserved groups, know about and access these vital resources. Some examples of programs this area would fund may include programs that provide multilingual resources, culturally tailored information, and community outreach events.

D. Independent Living Support Services

Independent Living Support services are essential for helping older adults maintain their independence and quality of life. When polled, 70% of older adults listed "staying in their home" as a major priority for them within a national survey[10]. Assistance with tasks such as housekeeping, meal preparation, and errands, which can become increasingly challenging for individuals with limited mobility or other health issues can help individuals age in place safely and comfortably, reducing the need for more costly institutional care options and promoting overall health and well-being. Organized volunteer programs that recruit volunteers to be matched with eligible older adults to assist with necessary chore services, both inside the home and out, can do much to help, particularly if they are language accessible, culturally responsive and trauma informed.

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[10] https://www.aarp.org/content/dam/aarp/research/surveys_statistics/liv-com/2018/home-community-preferences-chartbook.doi.10.26419-2Fres.00231.002.pdf

The target population for Independent Living Support services is higher need older adults, aged 55 and older, living in their own home or apartment. An emphasis shall be placed on serving individuals 65+ and ensuring access to BIPOC, Limited English Proficient (LEP), low-income, and/or LGBTQIA+ older adults. Clients eligible for Targeted Case Management under Medical Assistance or from case management paid for by any waiver program (e.g. Family Care & IRIS) are not eligible for this program.

IV. Eligibility

1. Eligibility is open to non-profit organizations and agencies that have tax-exempt status under 26 USC 501(c)(3) OR groups that can secure, as fiscal agents, organizations that have obtained such status. Please see the Fiscal Agent packet available on the Funding Process website for more information. Organizations that are identified to serve as Fiscal Agents on behalf of applicants will be asked to indicate their understanding of the City's expectations and agreement to act on the applicant's behalf.

2. Applicants may apply for funding to perform work within one or more of the following services:

   - A. Case Management Services
   - B. Culturally Relevant Services
   - C. Outreach, Information, and Referral Services
   - D. Independent Living Support Services

   Each service type has separate criteria for implementation and reporting. Applicants may apply for funding to perform work within one or more program type. Applicants should be aware of and incorporate best-practice standards outlined in this document in the planning, description and implementation of their proposals.

3. Eligible expenses include personnel, program/project supplies, space and special costs. No more than 20% may be applied to overhead or administrative costs. In awarding grants, the City may identify specific uses for allocations. Capital expenses related to the purchase of vehicles or property are not eligible. All awarded funds must be utilized in the timeline outlined in resultant contracts. Expenses not incurred by the contract end date will not be reimbursed.

Target Population
The City intends that all funded agencies take affirmative steps to ensure that programs and services are accessible to lower-income individuals, those who identify as Black, Indigenous, or People of Color (BIPOC), people who identify as LGBTQIA+, and Limited English Proficient (LPE) individuals. CDD places a high priority on ensuring that activities and programs are culturally and linguistically responsive to all residents.

The funds available for this RFP include $115,000 that was authorized to support services to Southeast Asian older adults. In the event that proposals are submitted specifically to serve that population, and such proposals satisfy the program or activity standards set forth in this policy paper and resulting RFP, they will be given priority regarding the use of these funds.

Funds Available
The CDD anticipates allocating up to $838,039 through this request for proposals process for contracts that will begin in 2025. CDD further expects to renew those contracts annually, contingent upon satisfactory agency performance and subject to the continued authorization of sufficient funding by the Common Council.

V. Timeline

Request for Proposal (RFP) Activity	Date
Introduce Older Adults Policy Paper to Common Council	5/7/24
Finance Committee	5/13/24
Common Council Approval	5/21/24
Publish RFP	5/24/2024
Older Adult Services RFP Workshop	6/5/24
DEADLINE FOR SUBMISSION OF PROPOSALS	7/1/2024
Applicant Presentations	8/28/2024
Committee on Aging Meeting – Finalize Funding Recommendations	9/25/2024
Resolution with Funding Recommendations Introduced to Common Council	10/8/2024
Finance Committee Action	10/14/2024
Common Council Action	10/29/2024
Applicants notified of Funding Allocations	10/30/2024
Anticipated contract start date	1/1/2025