

Older Adult Services

Introduction

The City of Madison’s Community Development Division (CDD) programming is reviewed through the lens of its impact on poverty, racial equity and social justice. CDD supports an evidence-based, trauma informed, holistic approach that includes coordinated service delivery to ensure that residents are able to access relevant services. Activities target low-income individuals, residents of color, and vulnerable populations and are designed to be culturally and linguistically responsive to residents.

This policy paper introduces the ideal proposed conceptual framework for 2021-2024 City of Madison Community Development Division funding for Older Adult Services specifically for adults aged 60 (or older) who reside in the City of Madison and fall below 240% of the Federal Poverty Level. Funded agencies will serve, overall, a minimum percentage of the following populations:

Race/Ethnicity	2021-2024
Black/African American	3.8%
Asian	3.2%
Hispanic or Latino	2.5%
Other Race/Ethnicity	0.9%
LGBTQ+	3.8%

The services to be supported with the funds authorized in the 2021 Operating Budget fall under the purview of the City’s framework for Older Adult Services. Determinations will be based on evaluations of submitted proposals.

Background

Older adults, particularly those who are low-income and who may be managing chronic physical and/or mental health issues without natural support systems, have an increased dependency upon a complex human service and health care system and often benefit from case management services and older adult activities.

The City of Madison’s Senior Adult Services framework, approved in 2015, identified case management and senior activities programming as among the service strategies for which City funds would be made available. Mental health services are not considered to be within the scope of City funding as Dane County is mandated to provide these services.

The Community Development Division of the City of Madison seeks to create the necessary conditions for older adults in Madison to successfully age in place. The City is therefore seeking proposals from agencies to provide the following services for the older adult population in Madison:

Case Management Services

The request for proposal process will focus on the allocation of funds to programs providing services consistent with the current standards for case management services as defined in Area Agency on Aging Client Centered Case Management Standards and the National Association of Social Workers Code of Ethics.

The target population for Case Management is older adults age 60 (and older) living in his or her own home, apartment, or home of a family member in Madison and fall at or below 240% of the Federal Poverty Level. Clients eligible for Targeted Case Management (e.g. 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, culturally competent to deal with various races, ethnicities, sexual orientations and gender identities, and be trauma-informed. City supported case management processes will begin with a psychosocial and functional assessment of client needs in areas including, for example: Mental Health, housing, eligibility, and assistance applying for financial and health care benefits, In-home assistance, family care, Activities of Daily Living, and access to culturally appropriate and language accessible older adult activities.

Programmatic Requirements:

- Case Management provider will be able to leverage one or more of the following funding streams through Dane County: Targeted Case Management, Comprehensive Community Services, Crisis Stabilization and/or General Case Management.
- Case Management staff will have demonstrated training and/or experience in case management with older adults from a variety of socioeconomic backgrounds, cultures and ethnicities.
- Case Managers will develop a written individualized service plan as informed by an assessment of the needs of the older adult client and the client's family, as appropriate, and provide referral, coordination, monitoring, evaluation and advocacy for a package of services to meet the specific needs and preferences identified in each clients' service plan.
- Demonstrated partnerships with ADRC, NewBridge, RSVP, Outreach, Freedom Inc., Hmong Institute, and/or other culturally competent agencies for purposes of referrals and access to supportive services and benefits.
- Services provided are culturally and linguistically responsive to the specific needs of the older adult consumer.
- Case Managers will have multiple scheduled interpersonal interactions with active clients.
- Case Management agency demonstrates a commitment to staff training and continuous improvement for service delivery.
- Case Management agency collaborates with the area Agency on Aging for staff training in case management.

Alignment with Dane County Area Agency on Aging Case Management Standards

- The case manager should have post-high school training of an associate, bachelor, or master's degree in a field related to health and human services. The case manager shall have the knowledge, skills, and experience necessary to competently perform client-centered case management duties.
- The case manager shall improve access to needed services for clients.

- The case manager shall be knowledgeable about resource availability, service costs, and budgetary parameters and be fiscally responsible in carrying out client-centered case management functions and activities.
- The case manager shall treat colleagues with courtesy and strive to enhance inter-professional, intra-professional, and interagency cooperation on behalf of the client.
- The case manager shall participate in evaluative and quality assurance activities designed to monitor appropriateness and effectiveness of both service delivery system and client-centered case management.
- The case manager shall carry a reasonable caseload that allows time to effectively plan, provide, and evaluate client-centered case management tasks related to client and system interventions.
- The case manager shall use professional knowledge, skills, and competence in serving the client whose interests are paramount.
- The case manager shall ensure that clients are involved in all phases of client-centered case management practice to the greatest extent possible.
- The case manager shall ensure the client's right to privacy and ensure appropriate confidentiality when information about the client is released to others.
- The case manager shall intervene at the client level to provide and/or coordinate delivery of direct services to clients and their families.

The request for proposal process will focus on the allocation of funds to programs providing services consistent with the current standards for senior case management services as outlined in Area Agency on Aging Client Centered Case Management standards.

Clear and Measurable Outcomes

The City of Madison is moving toward the goal of having standardized outcomes and measures for similar program models. Funded programs will establish clear and measurable outcomes appropriate to case management in alignment with Dane County Area Agency on Aging (AAA) Case Management Standards, approved by the AAA Board. Outcomes listed are not exhaustive, and are meant to demonstrate the effectiveness of the program support for maintaining independent living.

- 75% of clients receiving case management services will access two of the resources identified in their Individual Service Plan (ISP), which address their goals. The provider will conduct random case reviews of at least 10% of unduplicated clients.
- 75% of clients in case management are connected to needed services that support independent living.

Older Adult Activity Program

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, and special events. Applicant agency should be prepared to describe a range of programming that addresses these focal areas.

The target population for Older Adult Activity Programs is older adults aged 60 and over whose income level is at or below 240% of the Federal Poverty Level.

Programs need to be language accessible, culturally responsive to various races, ethnicities, sexual orientations and gender identities and be trauma-informed. Provided programs should 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 topic 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.
- **Engagement with Life:** Some examples: spirituality, field trips, social relationships, friendship development, intergenerational and volunteer activities.

Activities may be provided by agency and program staff or through coordination with community partners and service providers.

Educational programs may serve many of the above functions and can create opportunities to inform older adults about services and programs to enhance their independence and well-being. Staff interactions may encourage referral to additional supportive social services.

Programmatic Requirements

Outreach

- Conduct grassroots outreach in neighborhoods to reach isolated, low-income and non-participatory older adults.
- Market activities in a culturally linguistic manner. Collaborate with other agencies for cross promotion.
- Make presentations to groups and potential sponsors to promote the older adult activities program.

Program Design

- Programs will provide culturally responsive services to various races, ethnicities, sexual orientations and gender identities that are linguistically appropriate, and trauma-informed services designed to build trust with all older adults and are relevant to their needs.
- Programs will be adequately staffed to provide for safety and engagement of the participants.
- Establish and maintain neighborhood/community relationships.
- In partnership with program participants and City residents, continually explore new opportunities and collaborations for older adult programming.
- Identify a variety of programs that address the social, economic, intellectual, educational, spiritual, cultural, physical and emotional aspects of aging that appeal to older adults in the community.
- Develop and maintain program resources and information files.

- The contract agency will demonstrate the ability to manage all fiscal and reporting requirements required to maintain contract compliance.

Coordination and Implementation

- Demonstrate effective working relationships with other community service providers, neighborhood centers and nutrition sites serving seniors to increase programming and resource options available to older adults.
- Demonstrate programs and activities that increase accessible educational, health and wellness, social and recreational opportunities for older adults to age in place in their community.

Staff Training and Support

- Older Adult Activities staff should have post-high school training of an Associate degree, Bachelor's degree (BA) or Master's degree; or two to four years related experience and/or training; or equivalent combination of education and experience.
- Staff will demonstrate training and experience in language accessible, culturally responsive service provision for older adults.
- Staff will oversee all programs and events and designate staff to coordinate and attend activities.
- Serve as a liaison for and educate participants of available community resources. Make appropriate referrals.
- Maintain courteous, cooperative and professional relationships with fellow staff, volunteers, community agencies and participants.
- Programs and activities must align with City standards for Senior Services.
- Commit to staff training and continuous improvement for service delivery.

Documentation and Data

- The agency will demonstrate the ability to develop and maintain program resources and information files.
- The agency will demonstrate the ability to manage all fiscal and reporting requirements necessary to maintain contract compliance.
- The agency will demonstrate the ability to maintain participant records that document income level as well as race, ethnicity, age and gender demographics of residents served, the geographic location of services provided, and the addresses of clients in order to track distribution of services across the city.
- The agency will ensure the clients' right to privacy and ensure appropriate confidentiality when information about the client is released to others. Client files will be stored in a secure manner.

Clear and Measurable Outcomes

The City of Madison requires standardized outcomes for similar program models, using standardized measures. Funded programs will establish clear and measurable outcomes appropriate to the Senior Activities Framework. Outcomes listed are not exhaustive, and are meant to demonstrate the effectiveness of the program toward independent living and quality of life. Outcome measurements should include:

- 75% of older adults served access Older Adult Activities programs that improve 1) their physical and mental health, 2) their ability to engage with their community, and/or 3) their ability to avoid disease and disability.
- Random surveys are conducted of event participants, representing 10% of event participants present, and 75% of program participants report that program knowledge and engagement has improved the quality of their life.

Volunteer Guardian Program

The target population for the Volunteer Guardian program is older adults age 60 (and older) living in their own home or apartment in Madison who are at or below 240% of the Federal Poverty Level. Clients eligible for Targeted Case Management (e.g. Medical Assistance) or from case management paid for by any waiver program (e.g. Family Care, IRIS, Partnership) are not eligible for this program.

Older adults in the community may be affected by dementia and other cognitive issues and be without natural supports. Some common symptoms of these conditions are inability to make sound decisions in the best interest of themselves or others, inability to effectively handle their finances and therefore be vulnerable to exploitation and abuse and/or face legal issues. These symptoms may create difficult, sometimes dangerous situations. This population of older adults needs trained advocates to support their decision-making about housing, health care, finances, and other aspects of daily life in order to age in place with a high quality of life.

Programmatic Requirements

Program Design

- Volunteer Guardian agency will recruit and train older adults to serve as Volunteer Guardians and Representative Payees for individuals the courts have identified.
- Volunteer Guardian agency will have monthly contact with Volunteer Guardians to provide them with matching, monitoring, and problem-solving support by agency employees or consultants.
- Volunteer Guardian agency will provide culturally responsive and linguistically appropriate trauma-informed services that build trust with all older adults and is relevant to their needs.
- Volunteer Guardian agency will demonstrate the ability to develop and maintain program resources and information files.
- Volunteer Guardian agency will demonstrate the ability to manage all fiscal and reporting requirements required to maintain contract compliance.

Coordination and Implementation

- Demonstrate the ability to effectively recruit and train 50 volunteers.
- Provide 4000 hours of service to 100 older adults through the Volunteer Guardian and Representative Payee programs.

Staff Training and Support

- Volunteer Guardian staff should have post-high school training of an associate degree, Bachelor's degree (BA) or Master's degree, or two to four years related experience and/or training; or equivalent combination of education and experience.
- Staff will demonstrate training and experience in trauma-informed, culturally linguistic service provision for older adults.
- Designate staff to coordinate and attend volunteer training activities.
- Maintain courteous, cooperative and professional relationships with fellow staff, volunteers, community agencies and participants.
- Programs and activities must align with City standards for Senior Services.
- Commit to staff and volunteer training and continuous improvement for service delivery.

Documentation and Data

- The agency will demonstrate the ability to develop and maintain program resources and information files.
- The agency will demonstrate the ability to manage all fiscal and reporting requirements necessary to maintain contract compliance.
- The agency will demonstrate the ability to maintain participant records that document income level as well as race, ethnicity, age and gender demographics of residents served, the geographic location of services provided, and the addresses of clients in order to track distribution of services across the city.
- The agency will ensure the clients' right to privacy and ensure appropriate confidentiality when information about the client is released to others. Client files will be stored in a secure manner.

Clear and Measurable Outcomes

The City of Madison requires standardized outcomes for similar program models, using standardized measures. Funded programs will establish clear and measurable outcomes appropriate to the Senior Activities Framework. Outcomes listed are not exhaustive, and are meant to demonstrate the effectiveness of the program toward independent living and quality of life. Outcome measurements should include:

- Older adults matched with a trained volunteer will increase their overall level of functioning by 75% as measured by the following risk areas: housing, substance use, support network, psychiatric health, funding source adult protective services involvement, behavioral issues, financial risk, medical issues and physical health.
- 25 randomly selected clients will have their progress measured in the above ten categories using an assessment tool to evaluate their overall level of functioning.

Home Chore Assistance Program

The target population for the Home Chore Assistance Program is older adults aged 60 (and older) living in their own home or apartment whose income level is at or below 240% of the Federal Poverty Level and whose liquid assets do not exceed \$46,000.00. Clients eligible for Targeted Case Management (e.g. Medical Assistance) or from case management paid for by any waiver program (e.g. Family Care, IRIS, Partnership) are not eligible for this program.

Older adults living in the City of Madison benefit from home chore assistance that allows them to maintain their independent living status. The Home Chore Volunteer Program addresses this need by recruiting volunteers to be matched with eligible older adults to provide necessary chore services, both inside the home and out.

- Services need to be language accessible, culturally responsive and trauma-informed.

Programmatic Requirements

- Agency will provide volunteer recruitment, support and training events related to citywide Home Chore services.
- Agency will carry accident insurance to cover volunteers citywide.
- Agency will establish a reserve fund and administer for the purchase of home chore services for clients who are waiting for a volunteer or for clients whose situation is not conducive to volunteer assistance.
- Agency will provide an identified statement of criteria for appropriation of these funds.

Outreach

- Agency will conduct presentations that include information on home chore assistance.
- Agency will participate in Older Adult Health Fairs and Expos, as well as Volunteer Fairs throughout the City.
- Agency will market program in a culturally responsive linguistically appropriate manner.
- Agency will register service with Dane County's 2-1-1 system.

Program Design

- Agency will recruit and train volunteers to provide home chore assistance.
- Service will be provided in a culturally responsive, linguistically appropriate, trauma-informed manner that builds trust with the older adult and is relevant to their needs.
- Program will be adequately staffed to provide for safety and engagement of the participants.
- Develop and maintain program resources and information files.
- The contract agency will demonstrate the ability to manage all fiscal and reporting requirements required to maintain contract compliance.

Documentation and Data

- The agency will demonstrate the ability to develop and maintain program resources and information files.
- The agency will demonstrate the ability to manage all fiscal and reporting requirements necessary to maintain contract compliance.
- The agency will demonstrate the ability to maintain participant records that document income level as well as race, ethnicity, age and gender demographics of residents served, the geographic location of services provided, and the addresses of clients in order to track distribution of services across the city.
- The agency will ensure the clients' right to privacy and ensure appropriate confidentiality when information about the client is released to others. Client files will be stored in a secure manner.

Clear and Measurable Outcomes

- 75% of program participants state that the Home Chore program enables them to stay living safe and independently in their home.
- 75% of Home Chore volunteers indicate satisfaction in their role.

Eligibility

Note: Potential applicants are required to attend a 2020 Older Adult Services RFP Workshop, or schedule a conversation with City staff (Sally Jo Spaeni 267-8652) on their proposal prior to the week of April 6, 2020 to be eligible to apply. Applications will not be accepted from entities that have not attended a workshop or consulted with staff on their proposals.

1. Organizational eligibility is limited to non-profit organizations and agencies that have obtained 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. If an organization needs a fiscal agent and is unclear on the process or availability of agencies that would qualify as fiscal agents, please contact Sally Jo Spaeni at 608-267-8652.
2. Organizational eligibility is limited to non-profit organizations that have the credentials and certification to leverage Dane County's Comprehensive Community Service, Targeted Case Management, Crisis Stabilization, and/or General Case Management funding.
3. Applicants may apply for funding to perform work within one or more program types, using the format made available for each.
4. Eligible expenditures include personnel costs, program/project supplies and costs, 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 purchases related to purchase of vehicles or property will not be considered. All awarded funds must be utilized in the timeline outlined in resultant contracts. Any remaining funds not expended by the contract end date will not be available for project use.

Funds Available

This funding process introduces four program types to serve Older Adults. Each program type has separate criteria for implementation and reporting. Applicants may apply for funding to perform work within more than one program type.

2/21/2020

- Case Management service criteria follows the goals set forth in Dane County Area Agency on Aging Client-Centered Case Management Standards. The amount of City funds available for this program will relate to the utilization of other funds to support these services. City funds should be used for clients and activities that are not eligible for reimbursement through Dane County Human Services.
- Older Adult Activities, Volunteer Guardian and Home Chore program criteria follows the City of Madison Framework for Successful Aging.

Applicants should be aware of and incorporate best practice standards outlined in this document in the planning, description and implementation of their proposals.

Annual allocations totaling up to \$779,570.00 will be allocated through this request for proposal process. It is expected that 1-6 programs will be funded as a result of this RFP. Of this \$779,570.00, \$115,000.00 was appropriated one year ago by the Common Council to support South East Asian elders and it is our intent in this RFP process to sustain that support. Contract start dates are expected to begin in January 2021. It is expected that organizations and services selected through this process will continue through 2024.

Organizations can bill only for expenses incurred in execution of the funded programs within this time frame. Organizations are expected to be able to leverage other funding sources, including County-administered mental health funding, that are available to serve this population to support agency operations in addition to and outside of eligible grant expenditures.