

Seniors A1: Case Management

Agency	Program Name	2010 Funding	2011 Request	\$ change	% change	2012 Request
East Madison/Monona Coalition of the Aging	A. Outreach/Case Management	\$ 42,360	\$ 52,578	\$ 10,218	24.12%	\$ 52,578
Independent Living	Case Management- Housing Options	\$ -	\$ 35,000	\$ 35,000	n/a	\$ 36,050
Mental Health Center of Dane County	B. Southeast Asian Senior Services	\$ -	\$ 14,400	\$ 14,400	n/a	\$ 14,400
North/Eastside Senior Coalition	A. Case Management	\$ 84,849	\$ 103,349	\$ 18,500	21.80%	\$ 103,349
South Madison Coalition of the Elderly	A. Case Management Services	\$ 65,374	\$ 71,889	\$ 6,515	9.97%	\$ 71,889
West Madison Senior Coalition	A. Outreach/Case Management	\$ 32,660	\$ 33,313	\$ 653	2.00%	\$ 33,313
TOTALS		\$ 225,243	\$ 310,529	\$ 85,286	37.86%	\$ 311,579

ORGANIZATION:
PROGRAM/LETTER:

East Madison / Monona Coalition of the Aging

A Case Management

PROGRAM BUDGET

1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	75,431	54,967	14,792	5,672	0
DANE CO CDBG	0		0	0	0
MADISON-COMM SVCS	45,920	36,894	6,900	2,126	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	32,647	25,447	6,700	500	0
FUNDRAISING DONATIONS	10,232	3,316	2,761	4,155	0
USER FEES	0	0	0	0	0
OTHER	0	0	0	0	0
TOTAL REVENUE	164,230	120,624	31,153	12,453	0

2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	82,974	61,896	15,236	5,842	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	52,578	43,281	7,107	2,190	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	38,906	31,490	6,901	515	0
FUNDRAISING DONATIONS	10,539	3,415	2,844	4,280	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	184,997	140,082	32,088	12,827	0

*OTHER GOVT 2011

Source	Amount	Terms
City of Monona	38,906	annual allocation from the City of Monona for case management
	0	
	0	
	0	
	0	
TOTAL	38,906	

**OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:	East Madison / Monona Coalition of the Aging
PROGRAM/LETTER:	A Case Management

2012 PROGRAM CHANGE EXPLANATION

Complete only if you are requesting more than your 2011 request.

Note: Additional funding should only be requested where services or programming will change or expand in the second year.

3. PROGRAM UPDATE: If requesting more than 2011, describe any major changes being proposed for the program/service in 2012, i.e., expansions or narrowing in target population, scope and level of services, geographic area to be served, etc.).

200 characters (with spaces)

4. 2012 COST EXPLANATION

Complete only if significant financial changes are anticipated between 2011-2012.

Explain specifically, by revenue source, any significant financial changes that you anticipate between 2011 and 2012.

For example: unusual cost increases, program expansion or loss of revenue.

200 characters (with spaces)

5. 2012 PROPOSED BUDGET

REVENUE SOURCE	BUDGET TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	0

*OTHER GOVT 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:	East Madison / Monona Coalition of the Aging
PROGRAM/LETTER:	A Case Management
PRIORITY STATEMENT:	OCS: Seniors A1: Case Management (SCAC)

DESCRIPTION OF SERVICES

6. NEED FOR PROGRAM: Please identify local community need or gap in service that the proposed program will address.

The goal of case management is to help seniors safely remain in their own home. Assisting seniors in their homes by helping them access community services is more cost effective than placing seniors in nursing homes or community based residential facilities and provides a better quality of life. There are community services available to help seniors remain independent, but often seniors need help learning about these services and navigating the application processes. Case managers help seniors live independently by connecting them to needed services, assisting seniors as they work with service providers, and advocating for senior's needs. Because of the growing number of seniors who do not have family or friends living close by who can support them, there is a growing need for the support which case managers provide for these seniors and their families. The more seniors in our service area who learn about case management, the more seniors EMMCA will be able to assist.

7. SERVICE DESCRIPTION - Describe the service(s) provided including your expectations of the impact of your activities.

Case management services help seniors age 60+ safely remain in their own homes and community. Case managers assist seniors with identifying information, locating resources, and managing community support services. Referrals of seniors to the case management program come from the individual, their family or friends, social service agencies, medical clinics, hospitals, clergy, and other community representatives. Each senior who receives case management services with EMMCA is connected with a case manager on our staff. Case managers make home visits to assess each client's needs; provide ongoing management of senior's needs over many years; and facilitate a caregivers' support group to help family members cope with the issues of providing care for a senior. Case managers are advocates for seniors and work with them and their families to help them understand and navigate many systems within our community. To increase awareness for case management services in east Madison, this 2011-2012 funding proposal includes a request to fund a half time outreach/program staff person. This person would organize informational presentations and other activities for seniors on the east side. There is no senior center or community center in the Madison portion of our service area. A half time outreach person is a cost effective way of providing seniors an opportunity to learn about community services and offer socialization activities to address the isolation many seniors face. We anticipate this outreach would increase the number of seniors who use our case management and other services.

8. PROPOSED PROGRAM CONTRACT GOALS: Include clearly defined service goals and process objectives: number of unduplicated clients to be served, number of service hours to be provided etc.

- 1) Annually serve 579 unduplicated clients in case management, including information & assistance
- 2) Annually serve 1010 unduplicated clients in information and referral
- 3) Annually 90% of case management clients can stay in their homes due to case management services
- 4) Annually provide 11 caregiver support groups
- 5) Hire new staff person who would be half time Outreach and Program Development and half time Home Chore Volunteer Coordinator (HC portion funded elsewhere)
- 6) If new staff position, hold at least 10 outreach programs in 2011 and at least 15 in 2012

9. SERVICE HOURS: Frequency, duration of service and hours and days of service availability.

EMMCA provides service Monday through Friday from 8:00 a.m. to 4:00 p.m.
 If case management services are needed outside of those hours, there is some flexibility.
 The Caregiver's Support group meets from 7:00-8:30 p.m. on the second Tuesday of each month.

ORGANIZATION:

East Madison / Monona Coalition of the Aging

PROGRAM/LETTER:

A Case Management

10. POPULATION SERVED: Please describe in terms of age, income level, LEP, literacy, cognitive or physical disabilities or challenges).

EMMCA's case management program serves seniors age 60+ who are residents of the east Madison/Monona service area and who live in their own home or apartment, or the home of a family member. The majority of the case management clients are seniors who are vulnerable for one or more reasons including: low income level, over 74 years of age, alcohol use, mental or cognitive impairment, physical disability or limited public transportation to services in Madison. By serving these seniors, EMMCA also is serving their families and caregivers. In addition the caregiver support group targets caregivers.

11. LOCATION: Location of service and intended service area (Include census tract where service is tract specific).

EMMCA is located at 4142 Monona Drive, Madison. The Madison service area is bordered on the west by Lake Monona and Highway 51 and bordered on the east by Brandt Road.

12. OUTREACH PLAN: Describe your outreach and marketing strategies to engage your intended service population.

EMMCA reaches out to the community to let people know about the case management services through our newsletter; modest advertising; our website; and by networking with other organizations that serve seniors. In 2010, EMMCA received a Brittingham Grant to develop four informational programs or socialization activities for seniors. These programs are being held in the far east side of Madison to target this growing and underserved population of seniors. This 2011-2012 application to the City of Madison expands on that grant and includes a request to fund a part time outreach and program development staff person who would develop programs targeted to underserved seniors in our service area. This staff person would arrange presentations about EMMCA and community services, informational programs about issues affecting seniors, and socialization activities to address isolation faced by seniors. EMMCA would work with facilities in our service area to host these events.

13. COORDINATION: Describe how you coordinate your service delivery with other community groups or agencies.

EMMCA is part of the Focal Point network. EMMCA staff works within the network to refer cases to the appropriate focal point. EMMCA staff also collaborates with staff from other agencies, organizations and programs such as service providers (i.e. Catholic Charities or RSVP), home care agencies (i.e. BrightStar), support agencies (i.e. Caring for the Caregiver or Alzheimer's and Dementia Alliance), transportation providers (i.e. Transit Solutions), churches, hospitals, and long term care facilities to make certain they are aware of our services and ensure they refer seniors from east Madison to EMMCA for case management or other services we provide. The relationships with these organizations are cooperative and reciprocal. EMMCA staff refers our case management clients and other seniors to agencies such as Alzheimer's and Dementia Alliance; Elder Law Center, MOST, or Caring for the Caregiver for their services. EMMCA also is a United Way agency and is part of their 211 referral system.

14. VOLUNTEERS: How are volunteers utilized in this program?

Because of the confidential nature of case management, no volunteers are used for case management work. Volunteers do support this program through their work in the office answering phones, helping with mailings, and assisting with non-confidential data entry or paperwork. The volunteer numbers listed below are for office volunteers who worked from January through June 2010.

15. Number of volunteers utilized in 2010?

8

Number of volunteer hours utilized in this program in 2010?

326

ORGANIZATION:

East Madison / Monona Coalition of the Aging

PROGRAM/LETTER:

A Case Management

16. BARRIERS TO SERVICE: Are there populations that are experiencing barriers to the service you are proposing, i.e., cultural differences, language barriers and/or physical or mental impairments or disabilities? Describe the ability of proposed program to respond to the needs of diverse populations.

Since Madison has no Senior Center or Community Center in the EMMCA service area, there is no natural place to use as a base for outreach activities. In addition the east side of Madison is growing and the population of seniors also has increased while transportation options available to this population have not kept pace with their need. (On average 9.8% of Madison's population is over 65, in our service area the average is over 11.4%. On average 60.5% of Madison has transit stop access, in the northern half of our service area the average is lower.) The majority of case management clients are seniors who are vulnerable for one or more reasons including: limited public transportation to services in Madison, low income level, over 74 years of age, mental or cognitive impairment, and/or physical disability. EMMCA's traditional means of outreach (new sletter, advertising, networking) have been effective in reaching many seniors, but with a growing senior population in the far east side of Madison, outreach targeted to these people will help them learn about services available in the Madison area. An outreach staff person would first identify the geographic portions of our service area which are underserved and the demographic groups who are underserved, and then design programs to reach these people. Examples of programming ideas include: informational meetings, support groups, socialization activities, senior exercise classes, and blood pressure clinics. EMMCA would work with east Madison churches and community organizations in underserved areas to host these events.

17. EXPERIENCE: Please describe how your agency, and program staff experience, qualifications, and past performance will contribute to the success of the proposed program?

EMMCA has over 35 years of experience serving seniors in east Madison and Monona. EMMCA staff has provided case management services throughout much of the time and has developed collegial working relationships with many social service agencies in the Madison area. The three case managers have the following educational and professional backgrounds: A) BA in Sociology and an MS in Social Work, 18 years with EMMCA, prior work with Catholic Charities; B) BA in Psychology, completed classes for Social Work Certification and is preparing for the tests, 2 years with EMMCA, prior work with developmentally disabled adults; and C) BS in Psychology with an emphasis in Gerontology, 6 months with EMMCA, prior work with a nursing home, a day care and with disabled adults. To keep current on issues related to case management and to network with area colleagues, the EMMCA case managers attend the monthly Case Manager Training Sessions. Because of their education and experience, the case management staff has a strong knowledge of the issues facing seniors and of the services available for seniors in east Madison. The executive director of EMMCA has over 20 years of experience with administration and program development and management. The executive director also has experience with recruitment and outreach and so will be a resource for the proposed outreach and program development staff person. EMMCA has other services such as the Caregiver's support group, our Day Center, our meal sites, the Lending Library and the Equipment Loan Closet, these all support the work of case management.

18. LICENSING OR ACCREDITATION: Report program licensing, accreditation or certification standards currently applied.

Not applicable

19. STAFF: Program Staff: Staff Titles, FTE dedicated to this program, and required qualifications for program staff.

Staff Title	FTE	City \$	Qualifications
Lead Case Manager	0.9	Yes	Bachelor's in social work required, master's preferred; 2 yrs exp.
Case Manager	1	Yes	Bachelor's in social work or related field; 1 year experience
Case Manager	0.5	Yes	Bachelor's in social work or related field; 1 year experience
Outreach & Program Develop	0.5	Yes	Bachelor's degree; program development experience
Executive Director	0.25	Yes	Bachelor's degree required, master's preferred; 2 yrs managemt exp.
Administrative Assistant	0.35	Yes	Associate's degree required, bachelor's preferred; 3 yrs admin exp.

ORGANIZATION:

East Madison / Monona Coalition of the Aging

PROGRAM/LETTER:

A Case Management

COMMUNITY RESOURCES DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "Community Resources Program Goals & Priorities" If not applying for CR Funds, go to Demographics (p. 8).

24. CONTRIBUTING RESEARCH

Please identify research or best practice frameworks you have utilized in developing this program.

The best practices EMMCA uses for case management are those based on the "National Association of Social Workers Standards for Social Work Case Management." The practices which are of particular importance are as follows: Program accessibility - case managers must be accessible - program hours must be adequate and the address must be accessible (EMMCA case managers visit clients in their homes to facilitate accessibility); Assessment - case managers should conduct a comprehensive assessment of needs and resources (EMMCA case managers have developed a check list to ensure all appropriate topics are covered with each client); Staff preparation and qualifications - formal training in social work case management and issues related to aging are preferred (EMMCA case managers all have at least a bachelor's degree, all attend Case Managers Training Sessions, and all work with each other to share information about issues affecting seniors and resources in the Madison area); Coordination of services - case managers have knowledge of available resources and ability to work within the service network (EMMCA case managers network with case managers and colleagues from other agencies to keep up to date on their knowledge of community resources and issues affecting seniors); Confidentiality, Case plans and Documentation - Case managers develop case plans and document their work with clients in a confidential manner (EMMCA case managers maintain comprehensive case management files which are held in confidence).

25. ACCESS FOR LOW-INCOME INDIVIDUALS AND FAMILIES

What percentage of this program's participants do you expect to be of low and/or moderate income?

82.0%

What framework do you use to determine or describe participant's or household income status? (check all that apply)

Number of children enrolled in free and reduced lunch

Individuals or families that report 0-50% of Dane County Median Income

Individual or family income in relation to Federal Poverty guidelines

Other

X

26. HOW IS THIS INFORMATION CURRENTLY COLLECTED?

During the intake process, clients are asked if they earn less than \$15,000 per year.

27. PLEASE DESCRIBE YOUR USER FEE STRUCTURE AND ANY ACCOMMODATIONS MADE TO ADDRESS ACCESS ISSUES FOR LOW INCOME INDIVIDUALS AND FAMILIES.

Not applicable

ORGANIZATION:

East Madison / Monona Coalition of the Aging

PROGRAM/LETTER:

A Case Management

28. DEMOGRAPHICS

Complete the following chart for unduplicated participants served by this program in 2009. Indicate the number and percentage for the following characteristics. For new programs, please estimate projected participant numbers and descriptors.

PARTICIPANT DESCRIPTOR	#	%	PARTICIPANT DESCRIPTOR	#	%
TOTAL	537	100%	AGE		
MALE	129	24%	<2	0	0%
FEMALE	408	76%	2 - 5	0	0%
UNKNOWN/OTHER	0	0%	6 - 12	0	0%
			13 - 17	0	0%
			18 - 29	0	0%
			30 - 59	0	0%
			60 - 74	178	33%
			75 & UP	359	67%
			TOTAL AGE	537	100%
			RACE		
			WHITE/CAUCASIAN	521	97%
			BLACK/AFRICAN AMERICAN	13	2%
			ASIAN	2	0%
			AMERICAN INDIAN/ALASKAN NATIVE	1	0%
			NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%
			MULTI-RACIAL:	0	0%
			Black/AA & White/Caucasian	0	0%
			Asian & White/Caucasian	0	0%
			Am Indian/Alaskan Native & White/Caucasian	0	0%
			Am Indian/Alaskan Native & Black/AA	0	0%
			BALANCE/OTHER	0	0%
			TOTAL RACE	537	100%
			ETHNICITY		
			HISPANIC OR LATINO	2	0%
			NOT HISPANIC OR LATINO	535	100%
			TOTAL ETHNICITY	537	100%
			PERSONS WITH DISABILITIES	18	3%
			RESIDENCY		
			CITY OF MADISON	364	68%
			DANE COUNTY (NOT IN CITY)	173	32%
			OUTSIDE DANE COUNTY	0	0%
			TOTAL RESIDENCY	537	100%

Note: Race and ethnic categories are stated as defined in HUD standards

ORGANIZATION:

East Madison / Monona Coalition of the Aging

PROGRAM/LETTER:

A Case Management

29. PROGRAM OUTCOMES

Number of unduplicated individual participants served during 2009.	537
Total to be served in 2011.	579

Complete the following for each program outcome. No more than two outcomes per program will be reviewed.

If applying to OCS, please refer to your research and/or posted resource documents if appropriate.

Refer to the instructions for detailed descriptions of what should be included in the table below.

Outcome Objective # 1:	Seniors will remain in their own homes due to the support of case management or information and assistance.			
Performance Indicator(s):	90% of case management and information and assistance clients will remain in their homes while receiving support from EMMCA case managers.			
Proposed for 2011:	Total to be considered in	579	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	521.1
Proposed for 2012:	Total to be considered in	597	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	537.3
Explain the measurement tools or methods:	Case managers will review their files on a quarterly basis to determine the number of case management and information and assistance clients who have remained in their home during the quarter. If a review of their files does not yield the information, case managers will contact the client, the client's family or other collateral contacts to obtain the information.			
Outcome Objective # 2:	An increased number of seniors or their family members will get information about services and resources available in the community.			
Performance Indicator(s):	At least 1010 seniors or their family members will contact EMMCA case managers for information and referral services.			
Proposed for 2011:	Total to be considered in	1010	Targeted % to meet perf. measures	100%
	perf. measurement		Targeted # to meet perf. measure	1010
Proposed for 2012:	Total to be considered in	1010	Targeted % to meet perf. measures	100%
	perf. measurement		Targeted # to meet perf. measure	1010
Explain the measurement tools or methods:	Case managers will review their daily work logs to determine the number of information and referral clients with whom they have worked.			

11. To what extent is the agency's proposed budget reasonable and realistic, able to leverage additional resources, and demonstrate sound fiscal planning and management?

Staff Comments: Budget is clear costs appropriate, funding seems appropriately diverse, fundraising goals seem realistic.

12. To what extent does the agency's proposal demonstrate efforts and success at securing a diverse array of support, including volunteers, in-kind support and securing partnerships with agencies and community groups?

Staff Comments: Agency utilizes volunteers in appropriate roles, appears to have appropriate and necessary partnerships and collaborations in place.

13. To what extent does the applicant propose services that are accessible and appropriate to the needs of low income individuals, culturally diverse populations and/or populations with specific language barriers and/or physical or mental disabilities?

Staff Comments: Proposed program accessible to low income populations, and staff have training and experience in working with AODA and mental health issues. However, population served is not as culturally and ethnically diverse as expected. Again, the focus on targeted outreach identified within this proposal seems an appropriate use of resources.

Questions:

1. Clarify how unduplicated clients are defined case management vs information and referral. Then given that definition, determine appropriate contract goal. This should be consistent across all senior case management contracts.
2. What is your connection /collaboration with East Madison Community center and the Monona Senior Center?

14. **Staff Recommendation**

☐ **Not recommended for consideration**

☐ **Recommend for consideration**

x **Recommend with Qualifications**

Suggested Qualifications:

1. See questions above
2. Staff recommend that NESCO, EMMCOA and Goodman develop an MOU to address aspects of referral relationships and work responsibilities if NESCO extension to serve clients at Goodman is to be funded.
3. Improved coordination with East Madison Community Center and the Monona Senior Center?

ORGANIZATION:
PROGRAM/LETTER:

Independent Living, Inc	
C	Case Management-Housing Options

PROGRAM BUDGET

1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	0

2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	35,000	31,500	3,000	500	0
MADISON-CDBG	0				0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	35,000	31,500	3,000	500	0

*OTHER GOVT 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:	Independent Living, Inc
PROGRAM/LETTER:	C Case Management-Housing Options

2012 PROGRAM CHANGE EXPLANATION

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Note: Additional funding should only be requested where services or programming will change or expand in the second year.

3. PROGRAM UPDATE: If requesting more than 2011, describe any major changes being proposed for the program/service in 2012, i.e., expansions or narrowing in target population, scope and level of services, geographic area to be served, etc.).

200 characters (with spaces) N/A

4. 2012 COST EXPLANATION

Complete only if significant financial changes are anticipated between 2011-2012.

Explain specifically, by revenue source, any significant financial changes that you anticipate between 2011 and 2012.

For example: unusual cost increases, program expansion or loss of revenue.

200 characters (with spaces) N/A

5. 2012 PROPOSED BUDGET

REVENUE SOURCE	BUDGET TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	36,050	32,445	3,090	515	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	36,050	32,445	3,090	515	0

*OTHER GOVT 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:
PROGRAM/LETTER:
PRIORITY STATEMENT:

Independent Living, Inc
C Case Management-Housing Options
OCS: Seniors A1: Case Management (SCAC)

DESCRIPTION OF SERVICES

6. NEED FOR PROGRAM: Please identify local community need or gap in service that the proposed program will address.

1) Many low income seniors are not able to afford the usual market rate housing options, especially those developments that have all levels of care and services; 2) Many seniors are on a fixed income, frequently only social security is the only income source which can be as low as \$450/month; 3) Case managers with the Dane County focal points often don't have the time or resources to assist these individuals, currently already referring them to Independent Living, Inc. for assistance and support in locating and securing appropriate housing; 4) Older adults and their families outside of the City case management system, particularly families located outside of the county, call ILI requesting support in this area for older family members. Independent Living is requesting resources from the Community Services program in order to be able to offer personalized case management assistance to low income older adults who need help developing and implementing a housing plan.

7. SERVICE DESCRIPTION - Describe the service(s) provided including your expectations of the impact of your activities.

Using the model already in place as a core piece of our program, we would like to enhance this to include low to moderate income individuals seeking affordable housing options in the City of Madison. Experts in our organization related to Section 42, and Section 8 housing options will be utilized to meet the needs of the low income older adult to secure the most appropriate housing based on their income. This housing case management program would complement current county funded case managers to be freed up to do other case management that is more consistent with their role and expertise. It would be an added feature to the breath of county and city resources for the low income older adult seeking appropriate housing. The Housing Case Manager would focus on low to moderate income seniors, typically spending 4-6 hours per individual in consultation for those seeking assistance with housing. The key components of this program would include: 1) Assessment of the individuals' level of service needed, and type of housing would best meet their needs. 2) Development of a plan the individual would utilize to find appropriate housing based on their needs. 3) Assistance with the implementation of the plan, i.e. talking with landlords, assisting completion of Section 42 or Section 8 forms, and other needed paperwork to secure housing. 4) Property visits / tours. 5) Evaluation of this plan to assure that the right fit was secured. Alternatively, we may find clients where simply negotiation of rent is all that is needed as their current housing is appropriate for their needs.

8. PROPOSED PROGRAM CONTRACT GOALS: Include clearly defined service goals and process objectives: number of unduplicated clients to be served, number of service hours to be provided etc.

1) Assist 35 unduplicated households per contract year, averaging about 6-10 hours each to come up with a plan to secure appropriate affordable housing in the City of Madison. 2) Refer individuals with low income to county resources for assisted living care needs.

9. SERVICE HOURS: Frequency, duration of service and hours and days of service availability.

20 hours per week serving an average 1-2 individuals including assessment, development of a plan, assistance with implementation of this plan, property visits/tours, information and referral and follow-up with the client on whether the plan was successful for their situation. Assistance with eligibility forms completion. Staff availability would be Monday through Friday.

ORGANIZATION:

Independent Living, Inc

PROGRAM/LETTER:

C Case Management-Housing Options

10. POPULATION SERVED: Please describe in terms of age, income level, LEP, literacy, cognitive or physical disabilities or challenges).

Low to moderate income seniors in the City of Madison.

11. LOCATION: Location of service and intended service area (Include census tract where service is tract specific).

Likely the plan development work would occur in the clients' home with housing tours conducted as needed to appropriate housing sites in the City of Madison.

12. OUTREACH PLAN: Describe your outreach and marketing strategies to engage your intended service population.

Use current Navigating the Maze of Senior Housing sessions to identify low income City of Madison individuals needing this type of program. Contact all City of Madison focal points informing them of new housing Case Management Program through Independent Living, Inc. Public Service announcements of the program as well as articles in the paper about a successful participant using this program.

13. COORDINATION: Describe how you coordinate your service delivery with other community groups or agencies.

Work with the elderly service network, including focal points, hospitals, Caregiver Alliance, and other associations to promote housing case management for City of Madison residents. Work with major housing properties for referral of low income City of Madison residents.

14. VOLUNTEERS: How are volunteers utilized in this program?

1) assist clients with transportation needs 2) assist clients with site visits to prospective housing locations

15. Number of volunteers utilized in 2010?

0

Number of volunteer hours utilized in this program in 2010?

0

ORGANIZATION:

Independent Living, Inc

PROGRAM/LETTER:

C Case Management-Housing Options

16. BARRIERS TO SERVICE: Are there populations that are experiencing barriers to the service you are proposing, i.e., cultural differences, language barriers and/or physical or mental impairments or disabilities? Describe the ability of proposed program to respond to the needs of diverse populations.

With the diverse demographics of Madison, our marketing must match our efforts to allow diverse cultures access to this program. The barrier to service currently is lack of information and promotion. We would 1) develop a brochure in other languages and 2) work with case managers with organizations such as LaSup, Central Hispano, and Southern Wisconsin Lao-Hmong Association. Volunteers would also be recruited to assist with tours and translation needs.

17. EXPERIENCE: Please describe how your agency, and program staff experience, qualifications, and past performance will contribute to the success of the proposed program?

Independent Living, Inc. has developed senior housing expertise both from its development and ownership of over 200 units of senior housing in Dane county since the mid 1980's, as well as from its Rent Subsidy and Home Modification support programs. These programs have responded to the financial and physical needs older adults have related to maintaining and sustaining their housing choices. We have also observed over the years that certain older adults, as they become frail, are faced with the practical need to locate to more suitable housing environments. In 2008 we responded to the challenges seniors and / or families were facing by looking into independent and various levels of assisted living. We initiated the seminar "Navigating the Maze of Senior Housing in Dane county" which provides an overview of all the housing options available in our area to older adults and their families. The options, identify some of the key planning areas to be considered and the economic aspects of these options. In this complex environment, our participants tell us that our seminar helps them better understand options as well as directions to pursue. This program is presented bi-monthly to over 200 participants. We have seen many participants, particularly those who are low income, have more difficulty establishing a direction in their housing decision making, as options tend to narrow when fewer economic resources are available. These individuals tend to have few persons in their family/friends circle able to assist in planning & implementation of needed changes.

18. LICENSING OR ACCREDITATION: Report program licensing, accreditation or certification standards currently applied.

N/A

19. STAFF: Program Staff: Staff Titles, FTE dedicated to this program, and required qualifications for program staff.

Staff Title	FTE	City \$	Qualifications
Community Outreach/Ed Dir	0.4	Yes	5 + years of experience on working with older adults in the community setting. Strong case management skills and knowledge of county wide senior housing options and housing entitlement programs.

ORGANIZATION:	Independent Living, Inc
PROGRAM/LETTER:	C Case Management-Housing Options

CDBG DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "CDD Community Development Program Goals & Priorities". If not applying for CDBG Office Funds, go to Community Resources Description of Services Supplement (p. 7), or go to Demographics (p. 8).

20. PARTICIPANT INCOME LEVELS:

Indicate the number of households of each income level and size that this program would serve in 2011-2012.

Income Level	Number of Households
Over 80% of county median income	0
Between 50% to 80% of county median income	11
Between 30% to 50% of county median income	12
Less than 30% of county median income	12
Total households to be served	35

21. If projections for 2012 will vary significantly from 2011, complete the following:

Income Level for 2012	Number of Households
Over 80% of county median income	0
Between 50% to 80% of county median income	0
Between 30% to 50% of county median income	0
Less than 30% of county median income	0
Total households to be served	0

22. AGENCY COST ALLOCATION PLAN: What method does your agency use to determine indirect cost allocations among programs?

ILI uses a separate cost center, administration, to record shared (indirect) costs. On an annual basis, administrative staff allocate their time spent working with various program departments and this is the basis for allocating shared (indirect) costs. An overall allocation percentage to each program department is determined by using each administrative staff salary and his/her allocation percentage. Each month, actual shared (indirect) costs are charged to the program departments based on the allocation percentages.

23. PROGRAM ACTIVITIES: Describe activities/benchmarks by timeline to illustrate how your program will be implemented.

Activity Benchmark	Est. Month of Completion
Marketing and Promotion of the program	3/1/2011
5 cases closed	4/1/2011
10 cases closed	7/1/2011
10 cases closed	10/1/2011
10 cases closed	1/1/2012
10 cases closed	4/1/2012
10 cases closed	7/1/2012
10 cases closed	10/1/2012
5 cases closed	12/31/2012

ORGANIZATION:

Independent Living, Inc

PROGRAM/LETTER:

C Case Management-Housing Options

COMMUNITY RESOURCES DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "Community Resources Program Goals & Priorities" If not applying for CR Funds, go to Demographics (p. 8).

24. CONTRIBUTING RESEARCH

Please identify research or best practice frameworks you have utilized in developing this program.

In a recent edition of "Geriatrics" (Fall, 2009) the Journal of the American Society on Aging research indicates significant concern for older adults due to the economic downturn. In particular, authors Pynos and Liebig in "Changing Work, Retirement and Housing Patterns" indicate the current economy as having major impacts on "the work, retirement and residential arrangements" for older adults. In particular "Adults are dealing with unaffordable mortgages". "In the last six months of 2007, almost 25% of adults, aged 50 and older, were behind on their mortgages or facing foreclosure". Older adults who have seen pensions disappear or substantially decline, and may have used up savings, are unlikely to recover as the economic crisis eases. Securing safe, accessible and affordable housing for older adults significantly affected by the economic crisis, and those who entered the period already low income, have needs to efficiently and effectively find affordable housing solutions that this focused case management program can provide.

25. ACCESS FOR LOW-INCOME INDIVIDUALS AND FAMILIES

What percentage of this program's participants do you expect to be of low and/or moderate income?

100.0%

What framework do you use to determine or describe participant's or household income status? (check all that apply)

Number of children enrolled in free and reduced lunch

Individuals or families that report 0-50% of Dane County Median Income

Individual or family income in relation to Federal Poverty guidelines

Other

X

X

26. HOW IS THIS INFORMATION CURRENTLY COLLECTED?

This information will be collected during intake / initial assessment.

27. PLEASE DESCRIBE YOUR USER FEE STRUCTURE AND ANY ACCOMMODATIONS MADE TO ADDRESS ACCESS ISSUES FOR LOW INCOME INDIVIDUALS AND FAMILIES.

Access to this program will be without fee to low income persons.

ORGANIZATION:

Independent Living, Inc

PROGRAM/LETTER:

C Case Management-Housing Options

28. DEMOGRAPHICS

Complete the following chart for unduplicated participants served by this program in 2009. Indicate the number and percentage for the following characteristics. For new programs, please estimate projected participant numbers and descriptors.

PARTICIPANT DESCRIPTOR	#	%	PARTICIPANT DESCRIPTOR	#	%
TOTAL	0	0%	AGE		
MALE	0	0%	<2	0	0%
FEMALE	0	0%	2 - 5	0	0%
UNKNOWN/OTHER	0	0%	6 - 12	0	0%
			13 - 17	0	0%
			18 - 29	0	0%
			30 - 59	0	0%
			60 - 74	0	0%
			75 & UP	0	0%
			TOTAL AGE	0	0%
			RACE		
			WHITE/CAUCASIAN	0	0%
			BLACK/AFRICAN AMERICAN	0	0%
			ASIAN	0	0%
			AMERICAN INDIAN/ALASKAN NATIVE	0	0%
			NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%
			MULTI-RACIAL:	0	0%
			Black/AA & White/Caucasian	0	0%
			Asian & White/Caucasian	0	0%
			Am Indian/Alaskan Native & White/Caucasian	0	0%
			Am Indian/Alaskan Native & Black/AA	0	0%
			BALANCE/OTHER	0	0%
			TOTAL RACE	0	0%
			ETHNICITY		
			HISPANIC OR LATINO	0	0%
			NOT HISPANIC OR LATINO	0	0%
			TOTAL ETHNICITY	0	0%
			PERSONS WITH DISABILITIES	0	0%
			RESIDENCY		
			CITY OF MADISON	0	0%
			DANE COUNTY (NOT IN CITY)	0	0%
			OUTSIDE DANE COUNTY	0	0%
			TOTAL RESIDENCY	0	0%

Note: Race and ethnic categories are stated as defined in HUD standards

ORGANIZATION:

Independent Living, Inc

PROGRAM/LETTER:

C Case Management-Housing Options

29. PROGRAM OUTCOMES

Number of unduplicated individual participants served during 2009.	0
Total to be served in 2011.	35

Complete the following for each program outcome. No more than two outcomes per program will be reviewed.

If applying to OCS, please refer to your research and/or posted resource documents if appropriate.

Refer to the instructions for detailed descriptions of what should be included in the table below.

Outcome Objective # 1:

80% or 28 clients will have a housing plan developed and case will be closed after 3 months.

Performance Indicator(s):

80% or 28 clients will be satisfied and continue to be on track with their individualized housing plan after 3 months.

Proposed for 2011:

Total to be considered in	35
perf. measurement	

Targeted % to meet perf. measures	80%
Targeted # to meet perf. measure	28

Proposed for 2012:

Total to be considered in	35
perf. measurement	

Targeted % to meet perf. measures	80%
Targeted # to meet perf. measure	28

Explain the measurement tools or methods:

one on one personal contact with clients after three months.

Outcome Objective # 2:

Performance Indicator(s):

Proposed for 2011:

Total to be considered in	
perf. measurement	

Targeted % to meet perf. measures	0%
Targeted # to meet perf. measure	0

Proposed for 2012:

Total to be considered in	
perf. measurement	

Targeted % to meet perf. measures	0%
Targeted # to meet perf. measure	0

Explain the measurement tools or methods:

PROPOSAL REVIEW: Individual Staff Review for 2011-2012
For Community Resources Proposals to be Submitted to the
Community Services, Early Childhood and Senior Services Committees

1. **Program Name:** Case Management- Housing Advocate
2. **Agency Name:** Independent Living, Inc
3. **Requested Amounts:** 2011: \$35,000
 2012: \$36,050 Prior Year Level: \$0
4. **Project Type:** New ☐ Continuing X
5. **Framework Plan Objective Most Directly Addressed by Proposed by Activity:**
☐ I. Youth Priority ☐ VI Child(ren) &Family
☐ II. Access X VII Seniors A1
☐ III Crisis
6. **Anticipated Accomplishments (Proposed Service Goals)**
Serve 35 unduplicated households in housing focused case management, averaging about 6-8 hours per client.
Refer individuals with low income to county resources for assisted living care needs.
7. **To what extent does the proposal meet the Objectives of the Community Development Division, Community Resources Program Goals and Priorities for 2011-2012?**

Staff Comments: This program clearly meets Program Area IV-Priority A-1- Provide case management activities that help seniors live independently by connecting them to needed services.

8. **To what extent does the proposal incorporate an innovative and/or research based program design that will have a positive impact on the need or problem identified?**

Staff Comments: It seems likely that this program will have a positive impact on individuals and families seeking this service. The agency has experience working with Seniors and Housing issues. Independent Living owns over 200 units of Senior Housing in Dane County, and operates rent subsidy and Home modification support programs. Since 2008 they have presented a seminar on "Navigating the Maze of Senior Housing in Dane County". Agency sites research re impact of economic downturn on Seniors, not contributing research to program design. Agency estimates that they will be spending 6-8 hours per client may be conservative if outcome is to be that clients will secure housing, (not just develop plan) Proposal appears to state that Executive Director will staff this program.

9. **To what extent does the proposal include service goals and outcome objectives that are realistic and measurable and are likely to be achieved within the proposed timeline?**

Staff Comments: Service goals and outcomes are on the development of a housing plan, not necessarily on success in securing housing. A housing plan could be developed, but existing case management services could assist seniors and their families in doing this.

10. **To what extent do the agency, staff and/or Board experience, qualifications, past performance and capacity indicate probable success of the proposal?**

Staff Comments: Current Board membership numbers, experience and diversity of expertise seem adequate to provide appropriate oversight to organization. Agency has extensive history providing services in Madison. Agency does not demonstrate diversity of cultural or ethnic diversity on Board. Agency has extensive history providing services in Madison. Community Resources has not in recent history contracted with Independent Living Inc.

11. **To what extent is the agency's proposed budget reasonable and realistic, able to leverage additional resources, and demonstrate sound fiscal planning and management?**

Staff Comments: Budget is clear; costs appropriate, fundraising goals seem realistic. Although agency revenue is diverse, City is only funder for this program. This seems appropriate for a new service. If this service is funded and continues or expands in next funding cycle additional funders should be solicited. Agency requests an increase for second year but does not indicate an expansion or change in service so increase should not be considered

12. **To what extent does the agency's proposal demonstrate efforts and success at securing a diverse array of support, including volunteers, in-kind support and securing partnerships with agencies and community groups?**

Staff Comments: Agency proposes to use volunteers to assist with transportation needs, translation needs and site visits. Many agencies have reported difficulty in securing consistent well trained volunteers that are willing to translate. It is unclear whether this program proposal and services design has the support of the focal point agencies, which would be crucial in coordination of service delivery and development of a client base.

13. **To what extent does the applicant propose services that are accessible and appropriate to the needs of low income individuals, culturally diverse populations and/or populations with specific language barriers and/or physical or mental disabilities?**

Staff Comments: Proposed program financially accessible to low income populations. Proposal does not address transportation issues that this population will face, for example with housing case management take place through home visits to clients. Additionally, language access issues are not adequately addressed, nor any mention of the mental health AODA issues we know to be present in this population.

Questions:

- Agency is requesting \$35,000, primarily for a .4FTE of your Executive Director position. Are you proposing that the Executive Director will be providing the housing case management services?
- Why are all your positions asterisked on the Personnel schedule?
- Does this program meet the criteria for a case management program?
- How will agency respond when working with clients with multiple and extensive barriers?

14. **Staff Recommendation**

☐ **Not recommended for consideration**

☐ **Recommend for consideration**

☒ **Recommend with Qualifications**

Suggested Qualifications: See questions above. 1) Outcomes should be based on Number of seniors that secure housing, 2) cost of services out of line with other case management services contracted by the city.

ORGANIZATION:

Mental Health Center of Dane County, Inc. - Kajsia House

PROGRAM/LETTER:

B Southeast Asian Senior Services

PROGRAM BUDGET

1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	0

2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	14,400	14,400	0	0	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	2,000	1,000	1,000	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	16,400	15,400	1,000	0	0

*OTHER GOVT 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION: **Mental Health Center of Dane County, Inc. - Kajsia House**

PROGRAM/LETTER: **B Southeast Asian Senior Services**

2012 PROGRAM CHANGE EXPLANATION

Complete only if you are requesting more than your 2011 request.

Note: Additional funding should only be requested where services or programming will change or expand in the second year.

3. PROGRAM UPDATE: If requesting more than 2011, describe any major changes being proposed for the program/service in 2012, i.e., expansions or narrowing in target population, scope and level of services, geographic area to be served, etc.).

200 characters (with spaces)

4. 2012 COST EXPLANATION

Complete only if significant financial changes are anticipated between 2011-2012.

Explain specifically, by revenue source, any significant financial changes that you anticipate between 2011 and 2012.

For example: unusual cost increases, program expansion or loss of revenue.

200 characters (with spaces)

5. 2012 PROPOSED BUDGET

REVENUE SOURCE	BUDGET TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	14,400	14,400	0	0	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	2,000	1,000	1,000	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0		0
TOTAL REVENUE	16,400	15,400	1,000	0	0

*OTHER GOVT 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:
PROGRAM/LETTER:
PRIORITY STATEMENT:

Mental Health Center of Dane County, Inc. - Kajsia House
B Southeast Asian Senior Services
OCS: Seniors A1: Case Management (SCAC)

DESCRIPTION OF SERVICES

6. NEED FOR PROGRAM: Please identify local community need or gap in service that the proposed program will address.

•Southeast Asian American seniors (Hmong, Lao, Khmer, and Vietnamese) in Madison face many barriers keeping them from living independent lives. These barriers are language, transportation, and socioeconomic. These barriers also prevent them from full access to social services, advocacy and health care. These seniors are dependent on their children to provide transportation, translation, and access to social services and health care. Reliance on their children creates un-needed relationship tension, and financial burden for working adult children because these children must take time from work to provide transportation and translation for their parents. Working natural care providers must care for their elders because there in Madison there is no service provider that can specifically assist Hmong seniors to be more independent, although United Asians of Wisconsin and Mental Health Center of Dane County Inc., - Kajsia House work in some capacity with Hmong American seniors.

7. SERVICE DESCRIPTION - Describe the service(s) provided including your expectations of the impact of your activities.

•Kajsia House will provide intensive culture broker/case management model to deliver services to the targeted population. This is a model that has been practiced by the SEA Program of the Mental Health Center of Dane County Inc. for the last 15 years. It has been proven effective in working with Southeast Asian refugees. The case management model is culturally and language appropriated. The Culture brokers, bilingual/bicultural staff combine skills of translation (conveying words), interpretation (conveying what the words actually mean in context), and, brokering (giving enough information to the SEA senior(s) about the western culture so that they can understand the environment they find themselves in and giving information to westerner(s) about the SEA cultures so there is understanding about the SEA Seniors' cultural perspective and context). Specific activities of the case manager will be to provide case management, outreach, translation, social services advocacy, service linkage, access to help care, and assist seniors to find housing as needed. To be culturally appropriated and effective in reaching out to the SEA population, this project proposes to provide staff who can speak the language of each of the SE Asian American senior population group to serve 40 SEA seniors from July 2010 to December 2010.

8. PROPOSED PROGRAM CONTRACT GOALS: Include clearly defined service goals and process objectives: number of unduplicated clients to be served, number of service hours to be provided etc.

- The purpose of this program is to help SE Asian American seniors enjoy independent living and to ease reliance on their children. To achieve this Kajsia House propose the following goals:
- Goal One: Provide the equivalent of .4FTE Cultural Brokering/Intensive Case Management to provide case management services to the targeted population. The cultural broker will aide seniors to access social services, housing, advocacy, medical appointments, SSI appointment, understanding the Citizenship/Naturalization applications process.
- Goal Two: Serve up to 50 unduplicated SE Asian American seniors

9. SERVICE HOURS: Frequency, duration of service and hours and days of service availability.

•Hours of services are between 9 a.m. to 5 p.m. Monday through Friday. In addition to the case management, crisis support service will be provided as needed. There will be no limited to the frequency and duration of services.

ORGANIZATION:

Mental Health Center of Dane County, Inc. - Kajsia House

PROGRAM/LETTER:

B Southeast Asian Senior Services

10. POPULATION SERVED: Please describe in terms of age, income level, LEP, literacy, cognitive or physical disabilities or challenges).

•The target population for this grant is the Southeast Asian seniors (Hmong, Lao, Khmer, and Vietnamese) who are 65 years old and over. The majority are of Hmong Americans. 100 percent of these seniors survive on SSI income are on Medical Assistant. They qualify for public housing. These Southeast Asian share intertwined history that is filled with trauma due to war experience, forced dislocations, cultural isolation, and lost of loved ones. They also share the same barriers language, cultural isolation, and immobility.

11. LOCATION: Location of service and intended service area (Include census tract where service is tract specific).

•The location of services will be at Kajsia House located on the North side of Madison. It is a facility that is familiar to the SEA American community and it is accessible by bus.

12. OUTREACH PLAN: Describe your outreach and marketing strategies to engage your intended service population.

•Kajsia House will do public announcement through Hmong Radio Show WORT AM. The radio broadcasting is popular among SEA American seniors for entertainment and news. Kajsia House will utilize community resources and social clan system to best outreach the Hmong and SEA American seniors. This means meeting with Southern Wisconsin Hmong Association and 18 Clan Council to disperse recruiting flyers. All public announcement and flyers will be culturally and linguistically appropriate for Hmong American seniors.

13. COORDINATION: Describe how you coordinate your service delivery with other community groups or agencies.

•Kajsia House has working relationship with COP, South Madison Coalition, SoSiab, RSVP, CAC, and Second Harvest. There are a handful of Hmong seniors who are registered under COP, South Madison Coalition, SoSiab, who are regular consumers of Kajsia House. RSVP volunteers has come out to Kajsia House for the past 5 years to do arts and craft with Hmong seniors. Kajsia House relies on Second Harvest for daily free breakfast and lunch meals. Kajsia House has worked collaboratively with Madison Children Museum to develop the "Hmong At Heart Exhibit", Literacy Network of Dane County, United Asians of Wisconsin. There is ongoing communication with Northeast Family Clinic to help Hmong consumers access health care.

14. VOLUNTEERS: How are volunteers utilized in this program?

Kajsia House volunteers include a retired MMSD teacher who has been teaching English/Citizenship instructor every Wednesday from 10:30 to 12 p.m. for the past 9 years; a volunteer who has been teaching English for the past 2 years every Tuesday from 1 p.m. to 2:30 p.m. RSVP volunteers who came to KH to do arts and craft for the past 5 years and a recent Master's Level intern student.

15. Number of volunteers utilized in 2010?

7

Number of volunteer hours utilized in this program in 2010?

600

ORGANIZATION:

Mental Health Center of Dane County, Inc. - Kajsia House

PROGRAM/LETTER:

B Southeast Asian Senior Services

16. BARRIERS TO SERVICE: Are there populations that are experiencing barriers to the service you are proposing, i.e., cultural differences, language barriers and/or physical or mental impairments or disabilities? Describe the ability of proposed program to respond to the needs of diverse populations.

•Southeast Asian American seniors in Madison experience language, mobility, and lack of access to services that are unparalleled to other ethnic groups. 100 percent of the potential participants of this program are seniors live on Social Security Income. Thus, they experience extreme financial hardship. The target population also experience extreme isolation due to language and cultural barriers. There is heavy reliance on their children to be their transportation, translators, and community support. Those without the family support live imprisoned in their homes. The proposed program is designed especially to address their cultural, language, and socioeconomic barriers that prevent SE Asian Americans from fully living independent lives.

17. EXPERIENCE: Please describe how your agency, and program staff experience, qualifications, and past performance will contribute to the success of the proposed program?

•Kajsia House is the largest program in Dane County that serves SE Asian community. Kajsia House has 9 FTE who speaks, Hmong, English, Lao, and Thai – 5 staff have bachelor degree and 3 have masters degree. Kajsia House staff is supervised by Dr. Fredrick Coleman, M.D and Dr. Roger Garms, PhD. There are two senior training workers through the Senior Work. Kajsia House staff have combined 30 years of family, youth, and senior program development for Hmong, Lao, Cambodian senior program development

18. LICENSING OR ACCREDITATION: Report program licensing, accreditation or certification standards currently applied.

Kajsia House is a program of the Mental Health Center and it is licensed as an outpatient community services with the State of Wisconsin.

19. STAFF: Program Staff: Staff Titles, FTE dedicated to this program, and required qualifications for program staff.

Staff Title	FTE	City \$	Qualifications
Senior Coordinator	0.4	Yes	Bachelor or Masters degree of Social Work or related field

ORGANIZATION:

Mental Health Center of Dane County, Inc. - Kajsia House

PROGRAM/LETTER:

B Southeast Asian Senior Services

CDBG DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "CDD Community Development Program Goals & Priorities". If not applying for CDBG Office Funds, go to Community Resources Description of Services Supplement (p. 7), or go to Demographics (p. 8).

20. PARTICIPANT INCOME LEVELS:

Indicate the number of households of each income level and size that this program would serve in 2011-2012.

Income Level	Number of Households
Over 80% of county median income	0
Between 50% to 80% of county median income	0
Between 30% to 50% of county median income	0
Less than 30% of county median income	50
Total households to be served	50

21. If projections for 2012 will vary significantly from 2011, complete the following:

Income Level for 2012	Number of Households
Over 80% of county median income	0
Between 50% to 80% of county median income	0
Between 30% to 50% of county median income	0
Less than 30% of county median income	50
Total households to be served	50

22. AGENCY COST ALLOCATION PLAN: What method does your agency use to determine indirect cost allocations among programs?

The agency's indirect cost is 25% for Tax, professional insurance, administrative support, program support, technology support, human services support, and financial support

23. PROGRAM ACTIVITIES: Describe activities/benchmarks by timeline to illustrate how your program will be implemented.

Activity Benchmark	Est. Month of Completion
1. Hire and train Senior Coordinator	Nov. 31, 2010
2. Announcing the award recruiting seniors to the the SEA communities	Dec. 5, 2010
3. Begin programming	Jan. 3, 2011
4. Serving 15 SEA seniors by	Mar. 31, 2011
5. Serving 30 SEA seniors by	Sept. 31, 2011
6. Serving 45 SEA seniors by	Dec. 31, 2011

ORGANIZATION:

Mental Health Center of Dane County, Inc. - Kajsia House

PROGRAM/LETTER:

B Southeast Asian Senior Services

COMMUNITY RESOURCES DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "Community Resources Program Goals & Priorities" If not applying for CR Funds, go to Demographics (p. 8).

24. CONTRIBUTING RESEARCH

Please identify research or best practice frameworks you have utilized in developing this program.

Kajsia House has implemented the culture broker model in delivering services to the SEA seniors. MHDC/SEAPs have been using this model for the last 15 years. It is effective in working with refugee populations and it is culturally appropriate. The culture brokers are bilingual/bicultural staff who combine skills of translation (conveying words), interpretation (conveying what the words actually mean in context), and, brokering (giving enough information to the SEA senior(s) about the western culture so that they can understand the environment they find themselves in and giving information to westerner(s) about the SEA cultures so there is understanding about the SEA Seniors' cultural perspective and context). Developing staff members with this skill set is essential to the success of the Culture Brokering Model.

The starting point for all MHDC/SEAPs' outreach activities is an understanding of the SEA cultures and respect for the advice of SEA seniors and their families.

Our strategies in implementing this program with the culture broker model will follow the following set of guidelines:

1. Staff members will make sure that the locations and the environment are safe and comfortable.
2. Staff members are trained to respond to crisis and medical emergencies including calling 911 as appropriate.
3. SEA seniors are full partners in program development and designing.
4. Food can be prepared and shared on site.
5. There is acknowledgement of and cooperation with shamanistic, monks and other religious leaders.
6. Families and community members are encouraged to visit and get involved in the program.
7. The presence of grandchildren and children at the program is accepted.
8. Men's and women's roles in the family and community are respected.
9. Bilingual staff from within the project provide almost all of the services seniors require: including case management.
11. Staff members have all of the qualifications to provide the services and are bilingual/bicultural.

25. ACCESS FOR LOW-INCOME INDIVIDUALS AND FAMILIES

What percentage of this program's participants do you expect to be of low and/or moderate income?

100.0%

What framework do you use to determine or describe participant's or household income status? (check all that apply)

Number of children enrolled in free and reduced lunch

Individuals or families that report 0-50% of Dane County Median Income

Individual or family income in relation to Federal Poverty guidelines

Other

X

X

26. HOW IS THIS INFORMATION CURRENTLY COLLECTED?

All of the Southeast Asian seniors have language barriers. They suffered from the Vietnam War experiences, dislocation and refugee within their native countries before migrating to the United States and therefore all of them were found to be disabled and their sources of income is SSDI disability benefits.

27. PLEASE DESCRIBE YOUR USER FEE STRUCTURE AND ANY ACCOMMODATIONS MADE TO ADDRESS ACCESS ISSUES FOR LOW INCOME INDIVIDUALS AND FAMILIES.

The services to the Southeast Asian senior is free of charge.

ORGANIZATION:

Mental Health Center of Dane County, Inc. - Kajsia House

PROGRAM/LETTER:

B Southeast Asian Senior Services

28. DEMOGRAPHICS

Complete the following chart for unduplicated participants served by this program in 2009. Indicate the number and percentage for the following characteristics. For new programs, please estimate projected participant numbers and descriptors.

PARTICIPANT DESCRIPTOR	#	%	PARTICIPANT DESCRIPTOR	#	%
TOTAL	50	100%	AGE		
MALE	20	40%	<2	0	0%
FEMALE	30	60%	2 - 5	0	0%
UNKNOWN/OTHER	0	0%	6 - 12	0	0%
			13 - 17	0	0%
			18 - 29	0	0%
			30 - 59	0	0%
			60 - 74	50	100%
			75 & UP	0	0%
			TOTAL AGE	50	100%
			RACE		
			WHITE/CAUCASIAN	0	0%
			BLACK/AFRICAN AMERICAN	0	0%
			ASIAN	50	100%
			AMERICAN INDIAN/ALASKAN NATIVE	0	0%
			NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%
			MULTI-RACIAL:	0	0%
			Black/AA & White/Caucasian	0	0%
			Asian & White/Caucasian	0	0%
			Am Indian/Alaskan Native & White/Caucasian	0	0%
			Am Indian/Alaskan Native & Black/AA	0	0%
			BALANCE/OTHER	0	0%
			TOTAL RACE	50	100%
			ETHNICITY		
			HISPANIC OR LATINO	0	0%
			NOT HISPANIC OR LATINO	50	100%
			TOTAL ETHNICITY	50	100%
			PERSONS WITH DISABILITIES	0	0%
			RESIDENCY		
			CITY OF MADISON	50	100%
			DANE COUNTY (NOT IN CITY)	0	0%
			OUTSIDE DANE COUNTY	0	0%
			TOTAL RESIDENCY	50	100%

Note: Race and ethnic categories are stated as defined in HUD standards

ORGANIZATION:

Mental Health Center of Dane County, Inc. - Kajsiab House

PROGRAM/LETTER:

B Southeast Asian Senior Services

29. PROGRAM OUTCOMES

Number of unduplicated individual participants served during 2009.	50
Total to be served in 2011.	55

Complete the following for each program outcome. No more than two outcomes per program will be reviewed.

If applying to OCS, please refer to your research and/or posted resource documents if appropriate.

Refer to the instructions for detailed descriptions of what should be included in the table below.

Outcome Objective # 1:	To connect and advocate for services for the SEA seniors to assist them to live an indepent live in Madison.			
Performance Indicator(s):	90% of SEA seniors will have better understanding of the services availability to them and also gain more access to these serices.			
Proposed for 2011:	Total to be considered in	50	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	45
Proposed for 2012:	Total to be considered in	55	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	49.5
Explain the measurement tools or methods:	Each enrolled SEA senior will have a personal file that tracks all the services prodvided to him or her to measure the success rate of service.			
Outcome Objective # 2:	To improve their isolation, medical prevention and understanding, and family integration into the mainstream society.			
Performance Indicator(s):	90% of SEA seniors will feel less isolated, have better understanding of their health issues and can access to better health care prevention and treatment.			
Proposed for 2011:	Total to be considered in	50	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	45
Proposed for 2012:	Total to be considered in	55	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	49.5
Explain the measurement tools or methods:	Follow-up survey with seniors and family members, self report, and daily record of services.			

PROPOSAL REVIEW: Individual Staff Review for 2011-2012
For Community Resources Proposals to be Submitted to the
Community Services, Early Childhood and Senior Services Committees

1. **Program Name:** Southeast Asian Senior Services
2. **Agency Name:** Mental health center of Dane County, Inc- Kajsia House
3. **Requested Amounts:** 2011: \$14400
 2012: \$14400 Prior Year Level: \$0
4. **Project Type:** New ☐ Continuing ☒
5. **Framework Plan Objective Most Directly Addressed by Proposed by Activity:**
☐ I. Youth Priority ☐ VI Child(ren) & Family
☐ II. Access ☒ VII Seniors A1
☐ III Crisis
6. **Anticipated Accomplishments (Proposed Service Goals)**
Serve 50 unduplicated SE Asian American Seniors in case management.
Provide .4FTE Cultural Brokering /Intensive Case management services which includes translation, interpretation and brokering/cultural mediation services on behalf of seniors.
7. **To what extent does the proposal meet the Objectives of the Community Development Division, Community Resources Program Goals and Priorities for 2011-2012?**

Staff Comments: This program clearly meets Program Area IV-Priority A-1- Provide case management activities that help seniors live independently by connecting them to needed services.
8. **To what extent does the proposal incorporate an innovative and/or research based program design that will have a positive impact on the need or problem identified?**

Staff Comments: It seems likely that this program will have a positive impact on individuals and families seeking this service. The agency has extensive training and experience working with the South East Asian (SEA) aging populations and Dane County service networks. Service delivery model will be culturally sensitive and appropriate and the focus is on both increased independence of the senior and support of the extended family. Additionally, the program proposes to serve Hmong, Cambodian and Lao seniors.
9. **To what extent does the proposal include service goals and outcome objectives that are realistic and measurable and are likely to be achieved within the proposed timeline?**

Staff Comments: Service goals seem realistic given resources and structure, however from a contract management standpoint some consistency in language, measurement and outcomes between Senior Coalitions providing case management services would be advantageous. These issues could be addressed during the contracting phase by CDD staff.
10. **To what extent do the agency, staff and/or Board experience, qualifications, past performance and capacity indicate probable success of the proposal?**

Staff Comments: Current Board membership numbers, experience and diversity of expertise or representation seem adequate to provide appropriate oversight to organization. Agency has extensive history providing services in Madison. Community Resources has not in recent history contracted with Dane County Mental Health.
11. **To what extent is the agency's proposed budget reasonable and realistic, able to leverage additional resources, and demonstrate sound fiscal planning and management?**

Staff Comments: Budget is clear; costs appropriate, fundraising goals seem realistic. Although City is only funder, this seems appropriate for a new service. If this service continues and expands in next funding cycle additional funders should be solicited.

12. To what extent does the agency's proposal demonstrate efforts and success at securing a diverse array of support, including volunteers, in-kind support and securing partnerships with agencies and community groups?

Staff Comments: Agency utilizes experienced volunteers in appropriate roles, appears to have appropriate and necessary partnerships and collaborations in place.

13. To what extent does the applicant propose services that are accessible and appropriate to the needs of low income individuals, culturally diverse populations and/or populations with specific language barriers and/or physical or mental disabilities?

Staff Comments: Proposed program accessible to low income populations, and staff have training and experience in working with SEA AODA and mental health issues. Proposal seems to focus on services to Hmong population although they also state the agency has language capability to serve Lao and Thai.

Questions:

- Clarify how unduplicated clients are defined in your agency-case management vs information and referral.
- What percentage of your service population do you expect to be Lao, Vietnamese, or Cambodian? How will these populations be served?

14. **Staff Recommendation**

☐ Not recommended for consideration

☐ Recommend for consideration

x **Recommend with Qualifications**

Suggested Qualifications: See questions above. Additionally, through contracting process, CDD staff will work toward some consistency amongst case management outcomes in Senior Case management services.

ORGANIZATION:
PROGRAM/LETTER:

North/Eastside Senior Coalition
A Case Management

PROGRAM BUDGET

1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	76,503	67,286	5,629	3,494	94
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	84,849	72,838	7,668	4,213	130
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	20,000	17,185	2,042	754	19
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER	0	0	0	0	0
TOTAL REVENUE	181,352	157,309	15,339	8,461	243

2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	76,503	67,348	5,567	3,494	94
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	103,349	90,103	8,903	4,213	130
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	20,000	17,004	2,223	754	19
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	199,852	174,455	16,693	8,461	243

*OTHER GOVT 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:	North/Eastside Senior Coalition
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2012 PROGRAM CHANGE EXPLANATION

Complete only if you are requesting more than your 2011 request.

Note: Additional funding should only be requested where services or programming will change or expand in the second year.

3. PROGRAM UPDATE: If requesting more than 2011, describe any major changes being proposed for the program/service in 2012, i.e., expansions or narrowing in target population, scope and level of services, geographic area to be served, etc.).

In 2011, we are requesting an additional 15 hours of funding. This is for a Case Manager to attend the Goodman Community Center. This Case Manager would provide services to the senior dining program.

4. 2012 COST EXPLANATION

Complete only if significant financial changes are anticipated between 2011-2012.

Explain specifically, by revenue source, any significant financial changes that you anticipate between 2011 and 2012.

For example: unusual cost increases, program expansion or loss of revenue.

There are no financial changes between 2011 and 2012.

5. 2012 PROPOSED BUDGET

REVENUE SOURCE	BUDGET TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	76,503	67,348	5,567	3,494	94
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	103,349	90,103	8,903	4,213	130
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	20,000	17,004	2,223	754	19
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	199,852	174,455	16,693	8,461	243

*OTHER GOVT 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:
PROGRAM/LETTER:
PRIORITY STATEMENT:

North/Eastside Senior Coalition
A Case Management
OCS: Seniors A1: Case Management (SCAC)

DESCRIPTION OF SERVICES

6. NEED FOR PROGRAM: Please identify local community need or gap in service that the proposed program will address.

Case management is a community-based system designed to provide continued comprehensive access to services over time, and ensure the coordinated delivery of multiple services to an individual. Case management meets the needs of frail persons (age 60 and over) with complex and often chronic problems requiring ongoing service and a continuum of care. Case management also helps reduce isolation of senior adults. Seniors are educated about the community services, programs, and activities that enable them to stay active and connected in their community.

7. SERVICE DESCRIPTION - Describe the service(s) provided including your expectations of the impact of your activities.

Qualified case managers conduct psychosocial needs assessments in a face to face interview (home visit) and facilitates the creation of a service plan that will reflect the client's strengths, values, needs, and preferences. Case managers provide information about available resources, coordinate and monitor the referrals made and services received.

8. PROPOSED PROGRAM CONTRACT GOALS: Include clearly defined service goals and process objectives: number of unduplicated clients to be served, number of service hours to be provided etc.

1. 90% of 300 senior adults will have increased knowledge of community resources available to them. 2. 92% of 300 senior adults will remain safely in their own home through the coordination of community services. The unduplicated client number is 300, this is defined by a senior adult receiving case management services throughout the calendar year. The client must receive a homevisit where a functional and financial assessment is completed for their individualized service plan. 3,481 services hours will be provided

9. SERVICE HOURS: Frequency, duration of service and hours and days of service availability.

The weekly work schedule of each case manager may be adjusted to accommodate the work hours of the staff, the needs of the people to be served, and the work to be done. The services will be provided Mondays-Fridays, 8 am-4:30 pm.

ORGANIZATION:

North/Eastside Senior Coalition

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A Case Management

10. POPULATION SERVED: Please describe in terms of age, income level, LEP, literacy, cognitive or physical disabilities or challenges).

Case management is available to all senior adults (age 60 and older) who reside on the north/eastside of Madison and Latino/Spanish speaking seniors in Dane County. There is a special focus to involve seniors who are frail/elderly, isolated, low-income, lack family support, and experience cultural barriers to their participation. NESCO also hosts two monthly caregiver support groups (one provided in Spanish), as well as an ongoing Caregiver Workshop Series. There are no financial guidelines to receive service and currently services are provided free of cost, although donations are encouraged.

11. LOCATION: Location of service and intended service area (Include census tract where service is tract specific).

Case management services are delivered in a wide variety of locations that include the Coalition office, private residences, and community settings. The services are provided in the clients own homes.

12. OUTREACH PLAN: Describe your outreach and marketing strategies to engage your intended service population.

Information of upcoming Coalition events are posted in our monthly newsletter and website. Case managers educate senior adult clients (English & Spanish speaking) regarding available resources. NESCO assists them to gain independence by becoming a co-advocate for their own needs. NESCO case managers educate the client about resources/services, assisting the client in obtaining/navigating the system to acquire services/resources when necessary. Independence is increased when clients are knowledgeable about services available to them. Case managers educate the community and potential case management clients about programs available to seniors through individual home visits, participation at community events and resource fairs (e.g. Multicultural Senior Health & Energy Resource Fairs), monthly office hours at senior apartment buildings & community centers, and collaborations with other agencies in the community. NESCO also displays case management brochures at local agencies/businesses.

13. COORDINATION: Describe how you coordinate your service delivery with other community groups or agencies.

Case managers work closely with Dane County Mental Health's Mobile Outreach to Seniors Team (MOST) to work collaboratively with senior adults who have mental health needs. Case managers attend Multidisciplinary Team meetings facilitated by the Area Agency on Aging's Elder Abuse Department, Committee on Aging meetings and other networking meetings in the community. Case managers also work closely with other service agencies in Madison, not limited to: Alzheimer's Association of South Central WI, Dementia and Alzheimer's Alliance of WI, Comfort Keepers, Top Notch Cleaning, Home Health United's Meals on Wheels, Independent Living, Coalition of Wisconsin Aging Groups (CWAG), Dane County Human Services (STEP Unit), Centro Hispano, Community Action Coalition, Care Wisconsin, Latino Support Group (LaSup), and Retired Senior Volunteer Program (RSVP).

14. VOLUNTEERS: How are volunteers utilized in this program?

The Coalition has approximately 300 volunteers from 2009. For the case management program, there are many volunteers utilized in the home chore program, where they assist seniors with household chores.

15. Number of volunteers utilized in 2010?

286

Number of volunteer hours utilized in this program in 2010?

2,000

ORGANIZATION:

North/Eastside Senior Coalition

PROGRAM/LETTER:

A Case Management

16. BARRIERS TO SERVICE: Are there populations that are experiencing barriers to the service you are proposing, i.e., cultural differences, language barriers and/or physical or mental impairments or disabilities? Describe the ability of proposed program to respond to the needs of diverse populations.

NESCO provides case management to the Latino/Spanish speaking population of Dane County; we are the only senior focal point providing this service in Dane County. With only two bilingual case managers (with English & Spanish skills) funded, this is a barrier to service to the Latino population of Dane County. If NESCO or the other focal points were able to have additional bilingual case managers, this would be a much greater service to the Latino senior adult population. Due to limited bilingual case management funding, there are many Latino seniors who are not receiving case management services. If there were more funding options for bilingual case managers, then this population would be more greatly served. Our bilingual case managers could also provide more outreach to this population if there were more funding opportunities to present itself.

17. EXPERIENCE: Please describe how your agency, and program staff experience, qualifications, and past performance will contribute to the success of the proposed program?

The Coalition has four case managers on staff, two of which are bilingual in English/ Spanish. Two of our case managers have Master of Science degrees and two have Bachelor of Science degrees in Social Work. One case manager has a Certified Advanced Practice Social Work certification. Case managers have a wide array of previous experience before coming to NESCO. This includes working in the alcohol and drug field, family center services, disability advocacy, and mental health. This varied experience works well with our case management clients differing backgrounds. The varied experience our case managers bring to their clients is an asset to the effective management of case management concerns.

18. LICENSING OR ACCREDITATION: Report program licensing, accreditation or certification standards currently applied.

The Coalition is nationally and state accredited by the National Institute of Senior Centers and the Wisconsin Association of Senior Centers.

19. STAFF: Program Staff: Staff Titles, FTE dedicated to this program, and required qualifications for program staff.

Staff Title	FTE	City \$	Qualifications
Executive Director	0.11	Yes	Masters of Public Administration
Office Manager	0.13	Yes	Bachelors of Business Administration
Case Manager	0.68	Yes	Certified Advanced Practice Social Work Certified
Bilingual Case Manager	0.33	Yes	(unfilled at this time)
Lead Case Manager	0.46	Yes	Masters of Science
Bilingual Case Manager	0.39	Yes	Bachelors of Social Work

ORGANIZATION:

North/Eastside Senior Coalition

PROGRAM/LETTER:

A Case Management

CDBG DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "CDD Community Development Program Goals & Priorities". If not applying for CDBG Office Funds, go to Community Resources Description of Services Supplement (p. 7), or go to Demographics (p. 8).

20. PARTICIPANT INCOME LEVELS:

Indicate the number of households of each income level and size that this program would serve in 2011-2012.

Income Level	Number of Households
Over 80% of county median income	0
Between 50% to 80% of county median income	0
Between 30% to 50% of county median income	0
Less than 30% of county median income	0
Total households to be served	0

21. If projections for 2012 will vary significantly from 2011, complete the following:

Income Level for 2012	Number of Households
Over 80% of county median income	0
Between 50% to 80% of county median income	0
Between 30% to 50% of county median income	0
Less than 30% of county median income	0
Total households to be served	0

22. AGENCY COST ALLOCATION PLAN: What method does your agency use to determine indirect cost allocations among programs?

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23. PROGRAM ACTIVITIES: Describe activities/benchmarks by timeline to illustrate how your program will be implemented.

[illegible]

ORGANIZATION:

North/Eastside Senior Coalition

PROGRAM/LETTER:

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COMMUNITY RESOURCES DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "Community Resources Program Goals & Priorities" If not applying for CR Funds, go to Demographics (p. 8).

24. CONTRIBUTING RESEARCH

Please identify research or best practice frameworks you have utilized in developing this program.

After 35 years of existence, the case management program continues to be a fundamental component at NESCO. Case management actually began with outreach workers (individuals who provided basic information about nutrition sites, senior activities, educational programs, transportation, volunteer opportunities, etc.) but quickly switched to case management once outreach workers began facing an increasing number of senior adults with larger issues. Case managers are currently helping senior adults with increasing mental health issues, less family support/availability, lower socio-economic status, and other high need issues that are requiring case managers to spend more time with clients, yet the number of clients continues to grow. The Task Force Aging of Dane County produced a report (November 2004) recommending several factors: maintain the public policy of financially supporting a case management, increase case management training budgets, and increase funding for the case management system (both local and county). The disturbing fact is funding from county levy and local community monies have not increased enough to continue to meet the need for case management services to senior adults in Dane County. Couple this trend with the increasing number of Baby Boomers looming in the near future and this can spell serious consequences to this vital program. With the increasing Latino population in Dane County, NESCO recognizes the need to increase bilingual services for seniors. NESCO has the only two bilingual case managers of the 15 focal points and is a resource for the other focal points. The current fulltime Bilingual Case Managers manage a fulltime case load as well as coordinate and facilitate a caregiver's program for Latino seniors. This helps with information and referral for Latino seniors and importantly to facilitate and coordinate a Caregiver Program for Latino seniors. All Dane County case managers are required to meet standards, approved by the AAA.

25. ACCESS FOR LOW-INCOME INDIVIDUALS AND FAMILIES

What percentage of this program's participants do you expect to be of low and/or moderate income?

95.0%

What framework do you use to determine or describe participant's or household income status? (check all that apply)

Number of children enrolled in free and reduced lunch

X

Individuals or families that report 0-50% of Dane County Median Income

X

Individual or family income in relation to Federal Poverty guidelines

X

Other

26. HOW IS THIS INFORMATION CURRENTLY COLLECTED?

Case managers complete a financial assessment of their clients where the clients' income is reported. This information is entered into our client database.

27. PLEASE DESCRIBE YOUR USER FEE STRUCTURE AND ANY ACCOMMODATIONS MADE TO ADDRESS ACCESS ISSUES FOR LOW INCOME INDIVIDUALS AND FAMILIES.

Case management is provided at no cost to the client; however, we do encourage clients to make a donation for their case management services once a year.

ORGANIZATION:

North/Eastside Senior Coalition

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A Case Management

28. DEMOGRAPHICS

Complete the following chart for unduplicated participants served by this program in 2009. Indicate the number and percentage for the following characteristics. For new programs, please estimate projected participant numbers and descriptors.

PARTICIPANT DESCRIPTOR	#	%	PARTICIPANT DESCRIPTOR	#	%
TOTAL	306	100%	AGE		
MALE	95	31%	<2	0	0%
FEMALE	211	69%	2 - 5	0	0%
UNKNOWN/OTHER	0	0%	6 - 12	0	0%
			13 - 17	0	0%
			18 - 29	0	0%
			30 - 59	0	0%
			60 - 74	140	46%
			75 & UP	166	54%
			TOTAL AGE	306	100%
			RACE		
			WHITE/CAUCASIAN	218	71%
			BLACK/AFRICAN AMERICAN	33	11%
			ASIAN	2	1%
			AMERICAN INDIAN/ALASKAN NATIVE	0	0%
			NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%
			MULTI-RACIAL:	0	0%
			Black/AA & White/Caucasian	0	0%
			Asian & White/Caucasian	0	0%
			Am Indian/Alaskan Native & White/Caucasian	0	0%
			Am Indian/Alaskan Native & Black/AA	0	0%
			BALANCE/OTHER	53	17%
			TOTAL RACE	306	100%
			ETHNICITY		
			HISPANIC OR LATINO	53	17%
			NOT HISPANIC OR LATINO	253	83%
			TOTAL ETHNICITY	306	100%
			PERSONS WITH DISABILITIES	119	39%
			RESIDENCY		
			CITY OF MADISON	301	98%
			DANE COUNTY (NOT IN CITY)	5	2%
			OUTSIDE DANE COUNTY	0	0%
			TOTAL RESIDENCY	306	100%

Note: Race and ethnic categories are stated as defined in HUD standards

ORGANIZATION:

North/Eastside Senior Coalition

PROGRAM/LETTER:

A Case Management

29. PROGRAM OUTCOMES

Number of unduplicated individual participants served during 2009.	306
Total to be served in 2011.	300

Complete the following for each program outcome. No more than two outcomes per program will be reviewed.

If applying to OCS, please refer to your research and/or posted resource documents if appropriate.

Refer to the instructions for detailed descriptions of what should be included in the table below.

Outcome Objective # 1:	Senior adults will remain safely in their homes through the coordination of community services. (Number served: 300 clients)			
Performance Indicator(s):	Case managers conduct home visits to assess the individual needs of senior adults and then provide information, referrals and advocacy according to those needs. Case managers work closely with clients, their natural support systems, other community agencies involved to			
Proposed for 2011:	Total to be considered in	270	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	243
Proposed for 2012:	Total to be considered in	270	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	243
Explain the measurement tools or methods:	This will be monitored through weekly case management meetings, file reviews of 25 clients each quarter to monitor outcome objectives, monthly 610 reports to AAA and Dane County, quarterly information and assistance reports to AAA, quarterly and annual reports to the City of Madison, and an annual NESCO client survey which allows for case management feedback. This survey is printed in the agency's newsletter and also mailed to each case management client with a stamped return envelope. NESCO's Executive Director also conducts quarterly file reviews of each case manager to ensure all forms and case management policies are in place. The Lead			
Outcome Objective # 2:	Senior adults will have increased knowledge of community resources available to them. (Number served: 300 clients).			
Performance Indicator(s):	Case managers educate senior adults (English & Spanish speaking) regarding the resources available to them. NESCO assists them to gain independence by becoming a coadvocate for their own needs. Case managers educate the client about resources/services, assisting the client			
Proposed for 2011:	Total to be considered in	270	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	243
Proposed for 2012:	Total to be considered in	270	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	243
Explain the measurement tools or methods:	This will be monitored through weekly case management meetings, file reviews of 25 clients each quarter to monitor outcome objectives, monthly 610 reports to AAA and Dane County, quarterly information and assistance reports to AAA, quarterly and annual reports to the City of Madison, and an annual NESCO client survey which allows for case management feedback. This survey is printed in the agency's newsletter and also mailed to each case management client with a stamped return envelope. NESCO's Executive Director also conducts quarterly file reviews of each case manager to ensure all forms and case management policies are in place. The Lead			

**PROPOSAL REVIEW: Individual Staff Review for 2011-2012
For Community Resources Proposals to be Submitted to the
Community Services, Early Childhood and Senior Services Committees**

1. **Program Name:** Case Management
2. **Agency Name:** North Eastside Senior Coalition
3. **Requested Amounts:** 2011: \$103349
 2012: \$103349

**Prior Year Level: \$88689
(\$84,849 CR + \$3840 Supplemental)**
4. **Project Type:** New ☐ Continuing X
5. **Framework Plan Objective Most Directly Addressed by Proposed by Activity:**

☐ I. Youth Priority
☐ II. Access
☐ III Crisis

☐ VI Child(ren) & Family
X VII Seniors A1
6. **Anticipated Accomplishments (Proposed Service Goals)**
Serve 300 unduplicated clients in case management defined as clients that receive a home visit and have a functional and financial assessment completed. (92% will stay in their homes)
3481 Service hours will be provided.
7. **To what extent does the proposal meet the Objectives of the Community Development Division, Community Resources Program Goals and Priorities for 2011-2012?**

Staff Comments: This program clearly meets Program Area IV-Priority A-1- Provide case management activities that help seniors live independently by connecting them to needed services.
8. **To what extent does the proposal incorporate an innovative and/or research based program design that will have a positive impact on the need or problem identified?**

Staff Comments: It seems likely that this program will have a positive impact on individuals and families seeking this service. Staff have training and experience working with aging populations and service networks, service delivery is consistent with AAA case management standards. Outreach work proposed seems appropriate use of resources and seems to effectively utilize existing social networks. Program design includes an expansion from previous contract to have a case manager attend the Goodman Community Center meal program.
9. **To what extent does the proposal include service goals and outcome objectives that are realistic and measurable and are likely to be achieved within the proposed timeline?**

Staff Comments: Service goals seem realistic given resources and structure, however from a contract management standpoint some consistency in language, measurement and outcomes between Senior Coalitions providing case management services would be advantageous. These issues could be addressed during the contracting phase by CDD staff.
10. **To what extent do the agency, staff and/or Board experience, qualifications, past performance and capacity indicate probable success of the proposal?**

Staff Comments: Current Board membership numbers, experience and diversity of expertise or representation seem adequate to provide appropriate oversight to organization. Agency has extensive history providing services in Madison. Contract goals consistently are met or exceeded, reports are complete and on time.
11. **To what extent is the agency's proposed budget reasonable and realistic, able to leverage additional resources, and demonstrate sound fiscal planning and management?**

Staff Comments: Budget is clear costs appropriate, funding seems appropriately diverse, fundraising goals seem realistic.

12. To what extent does the agency's proposal demonstrate efforts and success at securing a diverse array of support, including volunteers, in-kind support and securing partnerships with agencies and community groups?

Staff Comments: Agency utilizes volunteers in appropriate roles, appears to have appropriate and necessary partnerships and collaborations in place. NESCO's ability to provide programming for culturally specific populations benefits all senior providers in service network.

13. To what extent does the applicant propose services that are accessible and appropriate to the needs of low income individuals, culturally diverse populations and/or populations with specific language barriers and/or physical or mental disabilities?

Staff Comments: Proposed program accessible to low income populations, and staff have training and experience in working with AODA and mental health issues. This program is one of the more culturally diverse, both in population served and staffing, however they note that more staff skilled in cultural and language diversity are needed.

Questions:

- Clarify how unduplicated clients are defined in your agency-case management vs. information and referral.
- How will the additional funds you are requesting augment what you are currently doing at Goodman?

14. **Staff Recommendation**

☐ Not recommended for consideration

☐ Recommend for consideration

x Recommend with Qualifications

Suggested Qualifications:

1. See questions above. Additionally, through contracting process, CDD staff will push for some consistency amongst case management outcomes in Senior Case management services.
2. Staff recommend that NESCO and Goodman develop an MOU to address aspects of referral relationship and work responsibilities if NESCO extension to serve clients at Goodman is to be funded.

ORGANIZATION:
PROGRAM/LETTER:

South Madison Coalition of the Elderly	
A	Case Management Services

PROGRAM BUDGET

1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	49,755	39,870	9,109	776	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	70,294	62,993	3,026	4,275	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	0	0	0	0	0
FUNDRAISING DONATIONS	2,094	2,094	0	0	0
USER FEES	6,764	4,458	1,367	939	0
OTHER	0				0
TOTAL REVENUE	128,907	109,415	13,502	5,990	0

2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	54,300	44,248	9,260	792	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	71,889	63,824	3,704	4,361	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	2,094	2,094	0	0	0
USER FEES	4,413	2,107	1,367	939	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	132,696	112,273	14,331	6,092	0

*OTHER GOVT 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:	South Madison Coalition of the Elderly
PROGRAM/LETTER:	A Case Management Services

2012 PROGRAM CHANGE EXPLANATION

Complete only if you are requesting more than your 2011 request.

Note: Additional funding should only be requested where services or programming will change or expand in the second year.

3. PROGRAM UPDATE: If requesting more than 2011, describe any major changes being proposed for the program/service in 2012, i.e., expansions or narrowing in target population, scope and level of services, geographic area to be served, etc.).

Dane County is planning to implement Family Care in 2012. This could have a significant effect on our agency and our budget needs.

4. 2012 COST EXPLANATION

Complete only if significant financial changes are anticipated between 2011-2012.

Explain specifically, by revenue source, any significant financial changes that you anticipate between 2011 and 2012.

For example: unusual cost increases, program expansion or loss of revenue.

200 characters (with spaces)

5. 2012 PROPOSED BUDGET

REVENUE SOURCE	BUDGET TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	0

*OTHER GOVT 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:
PROGRAM/LETTER:
PRIORITY STATEMENT:

South Madison Coalition of the Elderly
A Case Management Services
OCS: Seniors A1: Case Management (SCAC)

DESCRIPTION OF SERVICES

6. NEED FOR PROGRAM: Please identify local community need or gap in service that the proposed program will address.

The need for case management services is based on several factors, including the increased number of older adults in the community; advances in medicine resulting in prolonged life expectancies; families becoming more geographically dispersed; the fragmentation of the health care delivery service system; and the complex web of services available for older adults. In addition, our community has many older adults dealing with complex issues, primarily including chronic physical and/or mental health problems and difficulties with personal, interpersonal, social, and economic situations. Case management helps these older adults and their families negotiate the intricate social service network in order to take full advantage of its vast resources..

7. SERVICE DESCRIPTION - Describe the service(s) provided including your expectations of the impact of your activities.

Case management services are provided by "case managers" who help older adults and caregivers determine what their specific needs are and what services are available to meet those needs, so that older persons can continue to live as independently as possible.

The case manager first completes an assessment that evaluates the physical, financial, environmental, cognitive, and functional levels of the older adult. Case managers encourage the older adult to clearly express his or her needs and preferences for services. Based on the results of this assessment, the case manager and the older adult then develop a plan for the services. The plan enumerates the types and amount of services needed, and it includes the goals and outcomes the older adult would like to accomplish. The case manager coordinates and monitors the service delivery and continues to provide consistent contacts with the older adults and their families. Additionally the case manager functions as an advocate for improving the service system, assuring the client's well-being and providing service mediation when needed.

All case managers are trained social workers and caring professionals who are knowledgeable about issues related to aging and about community resources available for them.

8. PROPOSED PROGRAM CONTRACT GOALS: Include clearly defined service goals and process objectives: number of unduplicated clients to be served, number of service hours to be provided etc.

The goal of case management is to help older adults achieve and maintain optimum independence in their home and community. 358 unduplicated older adults will be served, and 2148 hours of service will be provided.

9. SERVICE HOURS: Frequency, duration of service and hours and days of service availability.

Case management services are provided Monday through Friday, 8:00 a.m. to 4:00 p.m. The duration of the services for an individual is based on their needs.

ORGANIZATION:

South Madison Coalition of the Elderly

PROGRAM/LETTER:

A Case Management Services

10. POPULATION SERVED: Please describe in terms of age, income level, LEP, literacy, cognitive or physical disabilities or challenges).

The target population for this program consists of persons age 60 and older living in the South Madison area. A large number of them are low-income individuals. Many have multiple medical and mental health problems.

11. LOCATION: Location of service and intended service area (Include census tract where service is tract specific).

The service area extends east from Randall Avenue to Martin Luther King Jr. Boulevard, and from Lake Mendota south to the Madison city limits and the Town of Madison.

12. OUTREACH PLAN: Describe your outreach and marketing strategies to engage your intended service population.

The South Madison Coalition's outreach activities target older people in the community who are difficult to contact and who may not be aware that senior services are available to assist them. The agency accomplishes this by having case managers available at several locations where older adults are available and where they may be more comfortable asking for assistance. Case managers man these satellite offices on a scheduled basis: at the Madison Senior Center, Romnes Apartments, Quaker Housing, Southridge Apartments, and Brittingham Apartments. In addition to this activity, the Coalition's staff meets regularly with significant service providers (including housing staff, community nurses, and mental health service providers) to identify older adults in need of case management.

The Coalition staff markets the availability of its services through a monthly newsletter, Web site, presentations to groups, and regular news releases.

13. COORDINATION: Describe how you coordinate your service delivery with other community groups or agencies.

Coordination of services with other service providers is a key component of the Coalition's case management program. We hold regular case conference meetings with various agencies to ensure that needed services are provided and that services continue to be appropriate for the older adult community. Some of the agencies that we work closely with to provide services include Elder Care of Wisconsin, Independent Living, Dane County Mental Health (Most Team), Home Health United, Dane County Income Maintenance Workers, Dane County's Elder Abuse Unit, various home-delivered meal programs, home care agencies, housing managers, hospital social service departments, lifeline companies, parish nurses, and others.

14. VOLUNTEERS: How are volunteers utilized in this program?

Volunteers are used to provide clerical support to the case managers. Volunteers are members of the program committee and board of directors who monitor service delivery.

15. Number of volunteers utilized in 2010?

10

Number of volunteer hours utilized in this program in 2010?

104

ORGANIZATION:

South Madison Coalition of the Elderly

PROGRAM/LETTER:

A Case Management Services

16. BARRIERS TO SERVICE: Are there populations that are experiencing barriers to the service you are proposing, i.e., cultural differences, language barriers and/or physical or mental impairments or disabilities? Describe the ability of proposed program to respond to the needs of diverse populations.

One significant barrier in providing adequate case management services is the language differences between staff members and non-English-speaking, older-adult clients. This program responds to these barriers by hiring or using volunteer interpreters to assist in communicating with these older adults.

Twenty percent of the older adults served in this program are from diverse populations. Outreach activities have been successful in reaching these communities in South Madison.

17. EXPERIENCE: Please describe how your agency, and program staff experience, qualifications, and past performance will contribute to the success of the proposed program?

The Coalition has been providing case management services for over 25 years in the South Madison community. The executive director has been with the agency for more than 26 years. Our case managers have significant number of years of experience, and many have MSW degrees. Because of their in-depth knowledge and experience, staff members regularly have been asked to provide technical assistance regarding case management to other organizations in Dane County. The Coalition was recently recognized by United Way for its expertise in case management. For more than ten years, the agency has had a contract with the Dane County Department of Human Service to provide case management throughout the county under the Community Options Program.

The Coalition's board of directors has a through knowledge of the community, social work practices, business procedures, and legal responsibilities. The directors have shown a consistently strong commitment to the organization and the community.

18. LICENSING OR ACCREDITATION: Report program licensing, accreditation or certification standards currently applied.

Case managers are state-licensed social workers.

19. STAFF: Program Staff: Staff Titles, FTE dedicated to this program, and required qualifications for program staff.

Staff Title	FTE	City \$	Qualifications
Executive Director	0.08	Yes	More than 40 years of experience managing older-adult programs..
Case Managers	2.3	Yes	Master's Degree
Secretary	0.01	No	10 years experience with the agency

ORGANIZATION:

South Madison Coalition of the Elderly

PROGRAM/LETTER:

A Case Management Services

COMMUNITY RESOURCES DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "Community Resources Program Goals & Priorities" If not applying for CR Funds, go to Demographics (p. 8).

24. CONTRIBUTING RESEARCH

Please identify research or best practice frameworks you have utilized in developing this program.

The South Madison Coalition has designed this service based on the established standards of the National Association of Social Workers for case management.

In addition, the agency follows the procedures established by the Dane County Department of Human Service and its case management quality standards.

25. ACCESS FOR LOW-INCOME INDIVIDUALS AND FAMILIES

What percentage of this program's participants do you expect to be of low and/or moderate income?

45.0%

What framework do you use to determine or describe participant's or household income status? (check all that apply)

Number of children enrolled in free and reduced lunch

Individuals or families that report 0-50% of Dane County Median Income

Individual or family income in relation to Federal Poverty guidelines

Other

X

26. HOW IS THIS INFORMATION CURRENTLY COLLECTED?

This information is obtained from the client during the assessment process. Income below \$15,000 is used as framework for low income.

27. PLEASE DESCRIBE YOUR USER FEE STRUCTURE AND ANY ACCOMMODATIONS MADE TO ADDRESS ACCESS ISSUES FOR LOW INCOME INDIVIDUALS AND FAMILIES.

Case Management is provided without fees for individuals 60 and over. We are providing private case management services when requested for a fee for individuals under 60 that have special needs.

ORGANIZATION:

South Madison Coalition of the Elderly

PROGRAM/LETTER:

A Case Management Services

28. DEMOGRAPHICS

Complete the following chart for unduplicated participants served by this program in 2009. Indicate the number and percentage for the following characteristics. For new programs, please estimate projected participant numbers and descriptors.

PARTICIPANT DESCRIPTOR	#	%	PARTICIPANT DESCRIPTOR	#	%
TOTAL	338	100%	AGE		
MALE	140	41%	<2	0	0%
FEMALE	198	59%	2 - 5	0	0%
UNKNOWN/OTHER	0	0%	6 - 12	0	0%
			13 - 17	0	0%
			18 - 29	0	0%
			30 - 59	0	0%
			60 - 74	187	55%
			75 & UP	151	45%
			TOTAL AGE	338	100%
			RACE		
			WHITE/CAUCASIAN	268	79%
			BLACK/AFRICAN AMERICAN	53	16%
			ASIAN	14	4%
			AMERICAN INDIAN/ALASKAN NATIVE	3	1%
			NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%
			MULTI-RACIAL:	0	0%
			Black/AA & White/Caucasian	0	0%
			Asian & White/Caucasian	0	0%
			Am Indian/Alaskan Native & White/Caucasian	0	0%
			Am Indian/Alaskan Native & Black/AA	0	0%
			BALANCE/OTHER	0	0%
			TOTAL RACE	338	100%
			ETHNICITY		
			HISPANIC OR LATINO	8	2%
			NOT HISPANIC OR LATINO	330	98%
			TOTAL ETHNICITY	338	100%
			PERSONS WITH DISABILITIES	0	0%
			RESIDENCY		
			CITY OF MADISON	338	100%
			DANE COUNTY (NOT IN CITY)	0	0%
			OUTSIDE DANE COUNTY	0	0%
			TOTAL RESIDENCY	338	100%

Note: Race and ethnic categories are stated as defined in HUD standards

ORGANIZATION:

South Madison Coalition of the Elderly

PROGRAM/LETTER:

A Case Management Services

29. PROGRAM OUTCOMES

Number of unduplicated individual participants served during 2009.	338
Total to be served in 2011.	358

Complete the following for each program outcome. No more than two outcomes per program will be reviewed.

If applying to OCS, please refer to your research and/or posted resource documents if appropriate.

Refer to the instructions for detailed descriptions of what should be included in the table below.

Outcome Objective # 1:	Older adults will become aware of services that will support them in their home and community.			
Performance Indicator(s):	70% of clients receiving case management services will identify three new resources that will address areas of needs in their case plans .			
Proposed for 2011:	Total to be considered in	50	Targeted % to meet perf. measures	70%
	perf. measurement		Targeted # to meet perf. measure	35
Proposed for 2012:	Total to be considered in	50	Targeted % to meet perf. measures	70%
	perf. measurement		Targeted # to meet perf. measure	35
Explain the measurement tools or methods:	A sample of client records will be reviewed by the case management supervisor to determine the number of clients who have identified three new resources during the case management assessment process.			
Outcome Objective # 2:	To enable older adults to increase their levels of independence			
Performance Indicator(s):	75% of clients receiving case management services will access two resource that address areas of need in their case plan.			
Proposed for 2011:	Total to be considered in	50	Targeted % to meet perf. measures	75%
	perf. measurement		Targeted # to meet perf. measure	37.5
Proposed for 2012:	Total to be considered in	50	Targeted % to meet perf. measures	75%
	perf. measurement		Targeted # to meet perf. measure	37.5
Explain the measurement tools or methods:	A sample of client records will be reviewed by the case management supervisor to determine the number of clients who have accessed two new resources identified during the case management assessment process.			

Community Services, Early Childhood and Senior Services Committees

- Prior Year Level: \$70294**
(\$65324 CR +\$4920 Supplemental)

III Crisis

12. To what extent does the agency's proposal demonstrate efforts and success at securing a diverse array of support, including volunteers, in-kind support and securing partnerships with agencies and community groups?

Staff Comments: Agency utilizes volunteers in appropriate roles, appears to have appropriate and necessary partnerships and collaborations in place.

13. To what extent does the applicant propose services that are accessible and appropriate to the needs of low income individuals, culturally diverse populations and/or populations with specific language barriers and/or physical or mental disabilities?

Staff Comments: Proposed program accessible to low income populations, and staff have training and experience in working with AODA and mental health issues. Given demographics of service area greater diversity in population (and staff) might be expected, although clients may be being served by culturally specific programs within NESCO

Questions:

- Clarify how unduplicated clients are defined in your agency-case management vs information and referral.
- It appears the agency used asterisks to identify all positions funded by City rather than exceptions to living wage

14. **Staff Recommendation**

☐ Not recommended for consideration

☐ Recommend for consideration

x **Recommend with Qualifications**

Suggested Qualifications: See questions above. Additionally, through contracting process, CDD staff will work toward some consistency amongst case management outcomes in Senior Case management services.

COMMUNITY DEVELOPMENT DIVISION

PROGRAM DESCRIPTION

CITY OF MADISON

ORGANIZATION:

West Madison Senior Coalition

PROGRAM/LETTER:

A Outreach/Case Management

PROGRAM BUDGET

1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	120,866	108,707	4,918	7,241	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	32,660	24,495	6,859	1,306	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	2,200	2,200	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	13,514	13,514	0	0	0
FUNDRAISING DONATIONS	3,000	0	3,000	0	0
USER FEES	0	0	0	0	0
OTHER	0	0	0	0	0
TOTAL REVENUE	172,240	148,916	14,777	8,547	0

2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	123,040	110,881	4,918	7,241	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	33,313	24,985	6,996	1,332	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	2,244	2,244	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	11,300	11,300	0	0	0
FUNDRAISING DONATIONS	4,100	600	3,500	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	173,997	150,010	15,414	8,573	0

*OTHER GOVT 2011

Source	Amount	Terms
Supportive Home Care	8,800	Case Management services to elderly persons who receive services under the D
MA Case Management	2,500	60 or older, eligible for Medical Assistance and reside in West Madison Senior C
	0	
	0	
	0	
TOTAL	11,300	

**OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:	West Madison Senior Coalition
PROGRAM/LETTER:	A Outreach/Case Management

2012 PROGRAM CHANGE EXPLANATION

Complete only if you are requesting more than your 2011 request.

Note: Additional funding should only be requested where services or programming will change or expand in the second year.

3. PROGRAM UPDATE: If requesting more than 2011, describe any major changes being proposed for the program/service in 2012, i.e., expansions or narrowing in target population, scope and level of services, geographic area to be served, etc.).

200 characters (with spaces)

4. 2012 COST EXPLANATION

Complete only if significant financial changes are anticipated between 2011-2012.

Explain specifically, by revenue source, any significant financial changes that you anticipate between 2011 and 2012.

For example: unusual cost increases, program expansion or loss of revenue.

200 characters (with spaces)

5. 2012 PROPOSED BUDGET

REVENUE SOURCE	BUDGET TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	0

*OTHER GOVT 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:
PROGRAM/LETTER:
PRIORITY STATEMENT:

West Madison Senior Coalition
A Outreach/Case Management
OCS: Seniors A1: Case Management (SCAC)

DESCRIPTION OF SERVICES

6. NEED FOR PROGRAM: Please identify local community need or gap in service that the proposed program will address.

Case Management services are designed to provide older adults, age 60 and over, the support they need to live independently in the community by identifying resources and coordinating services. Case Management services include assessment of need, coordination of services in response to those needs, monitoring of an individual's plan of care, and advocacy. Older adults and/or family members or advocates may make an appointment to meet with a case manager at the office, or have a personal visit in their home. The Case Management service also provides information and referrals for older adults. The Case Management program is unique in that our case manager team is able to serve as a hub for the many community services and resources that exist in the City of Madison and Dane County, to assist older adults and help them remain independent and in their own homes. Our Case Management Program provides individualized assistance in navigating through the complex aging network in Dane County.

7. SERVICE DESCRIPTION - Describe the service(s) provided including your expectations of the impact of your activities.

Case Management services are designed to provide older adults, age 60 and over, the support they need to live independently in the community by identifying resources and coordinating services. Case Management services include assessment of need, coordination of services in response to those needs, monitoring of an individual's plan of care, and advocacy. Older adults and/or family members or advocates may make an appointment to meet with a case manager at the office or have a personal visit in their home. The Case Management service also provides information and referrals for older adults. The Case Management program is unique in that our case management team is able to serve as a hub for the many community services and resources that exist in the City of Madison and Dane County, to assist older adults and help them remain independent and in their own homes. Our Case Management program provides individualized support and assistance in navigating through the complex aging network in Dane County. The impact of the case management activities, allows older adults to remain independent and in their own homes, staying out of assisted living or nursing home facilities, by utilizing the many services available to them.

8. PROPOSED PROGRAM CONTRACT GOALS: Include clearly defined service goals and process objectives: number of unduplicated clients to be served, number of service hours to be provided etc.

The Case Management program will provide service to 500 unduplicated persons, age 60 and older. Additionally, 975 individuals will receive information, assistance or referrals from the case management team. The program will provide older adults the support, resources, and community services they need to safely remain in their homes. Home visits will be conducted to assess the individual needs of each senior and then provide information, referrals, and advocacy according to those needs. Some individuals are looking for short-term information, while others benefit from ongoing support.

9. SERVICE HOURS: Frequency, duration of service and hours and days of service availability.

The West Madison Senior Coalition is open Monday - Friday from 8:00am - 4:00pm. For persons contacting the Coalition with a concern for the first time, there is a case manager on intake 5 days/week to handle those questions and concerns.

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10. POPULATION SERVED: Please describe in terms of age, income level, LEP, literacy, cognitive or physical disabilities or challenges).

The population served by the Case Management Program are individuals who are 60 or older, living in the West Madison Senior Coalition service area. Income levels vary, but many of our clients are at or below the Federal Poverty guidelines, enrolled in the Food Share program and living in subsidized housing. Disabilities vary in scope and depth, and include cognitive and physical. Many clients are challenged with mental health issues that range in severity. And clients are also challenged with transportation issues, food pantry needs, Medicare/Medicaid paperwork and many other issues.

11. LOCATION: Location of service and intended service area (Include census tract where service is tract specific).

The defined service area is Lake Mendota on the north to the city border on the south and from Randall Avenue on the east to the city border on the west. The office is located at 517 N Segoe Road.

12. OUTREACH PLAN: Describe your outreach and marketing strategies to engage your intended service population.

Our Coalition newsletter is published monthly and distributed to members, clients and the general population, outlining programs, activities and services available. Information is made available and presentations are held on a quarterly basis at our 3 nutrition sites, again talking about the case management program. We work within a network of neighborhood newsletters, senior apartment facilities, parish nurses, clinics, home health agencies and other non-profit agencies to communicate our services. The West Madison Senior Center has information and provides programming about case management and other relevant issues, available to the general public. Our agency website provides updated information and contact information for those seeking services via the internet. We include monthly articles and advertising in the Neighbors publication of the Wisconsin State Journals and also send PSAs to other media outlets on a regular basis.

13. COORDINATION: Describe how you coordinate your service delivery with other community groups or agencies.

We are part of the Dane County Focal Point system, so all senior services are coordinated similarly throughout Dane County and the referral piece is active within this system. We are a partner agency with the United Way of Dane County and are connected with the 2-1-1 line for help, which would refer people to our agency for assistance. We share information about services and upcoming services with other agencies on the west side of Madison, including the Alzheimer's and Dementia Alliance, RSVP of Dane County, and the MOST team through the Mental Health Center. We have made introductions to many of the senior residence facilities, allowing us to post information and present to residents on occasion. The case managers make connections with community groups and agencies on a daily basis as they work with their clients to help them meet their identified needs. The case management program serves as the "hub" or access point for hundreds of community resources and services available.

14. VOLUNTEERS: How are volunteers utilized in this program?

Because of the confidential nature of the case management program, there are no direct service volunteers in this program. However, there are office volunteers that answer telephone calls and direct clients to the appropriate case manager or the person on intake that particular day. Office volunteers also greet clients who come to the office to meet with their case manager.

15. Number of volunteers utilized in 2010?

2

Number of volunteer hours utilized in this program in 2010?

468

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16. BARRIERS TO SERVICE: Are there populations that are experiencing barriers to the service you are proposing, i.e., cultural differences, language barriers and/or physical or mental impairments or disabilities? Describe the ability of proposed program to respond to the needs of diverse populations.

In some cases there have been cultural and/or language barriers for clients. While the Coalition does not currently have any bi-lingual staff people, there are staff resources at both the South Madison Coalition and the North/Eastside Senior Coalition both in terms of addressing the language barriers and the cultural differences. With the addition of a nutrition site at the Lussier Community Education Center on Madison's far west side, we were able to increase our outreach to the Black and Latino communities in the Wexford Ridge neighborhood. Some of those individuals are now regular meal site participants and have been paired with a case manager to address other needs and concerns. Physical disabilities should not be a barrier to service. The preference of the case managers, when doing the initial home visit, is to meet with clients in their own homes, so travel outside of the home is not necessary. If clients choose to come to the office, the building is accessible. Mental impairments cause barriers to service but the Coalition's partnership with the Mental Health Center of Dane County MOST (Mobile Outreach to Seniors Team) is a valuable resource in helping the case management team deal with the mental health issues for most clients. Another potential barrier to service is transportation, but every effort is made to make arrangements for clients to attend important doctor's appointments, etc. One of the goals of the case management program is to help seniors overcome barriers, with the help of community programs and resources, to maintain independence.

17. EXPERIENCE: Please describe how your agency, and program staff experience, qualifications, and past performance will contribute to the success of the proposed program?

The West Madison Senior Coalition has been providing Case Management services to older adults since its incorporation in 1975. The case management program has served as the center of all services offered by the Coalition. Two of the three current case managers are Masters Degree level licensed social workers. The combined experience of the team presents nearly 50 years of human service work. The Coalition is an established and reputable agency in the Dane County aging network.

18. LICENSING OR ACCREDITATION: Report program licensing, accreditation or certification standards currently applied.

The Case Management program does not have any licensing or accreditation applications currently. Two of the three case managers on the team are Masters level licensed social workers.

19. STAFF: Program Staff: Staff Titles, FTE dedicated to this program, and required qualifications for program staff.

Staff Title	FTE	City \$	Qualifications
Case Managers	3	Yes	Bachelor's Degree and 1-2 years experience; Licensed Social Worker preferred
Executive Director	0.125	Yes	Bachelor's Degree and 2-4 years of previous experience
Administrative Assistant	0.2	Yes	High School Diploma or GED and 1-2 years of previous experience

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COMMUNITY RESOURCES DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "Community Resources Program Goals & Priorities" If not applying for CR Funds, go to Demographics (p. 8).

24. CONTRIBUTING RESEARCH

Please identify research or best practice frameworks you have utilized in developing this program.

There have been a number of documented characteristics for case management programs, based on a number of national social workers associations and organizations. Many of these program characteristics exist in the case management program of the West Madison Senior Coalition. Clients should be actively involved in their needs assessment and development of their individual case plan. The development of a case plan is very much team effort and part of the role of the case manager is to empower clients to take control, even if in small pieces, of their own situation, helping them to find the right resources for assistance. This case plan becomes a living document, noting progress and/or set-backs and any other changes to the plan along the way. Regular communication enables feedback of the plan to address changing client needs and satisfaction levels with their service. Outcome measurements should address client achievement in relation to the case plan. Comprehensive needs assessments should be conducted, including resources available and already being utilized by the client, also to include functional and financial assessments, which will help to identify other programs that may be available, based on eligibility criteria. Confidentiality is of utmost important in the case manager/client relationship. Case Managers ask for written permission from the client to speak with anyone within the client's support network (physician, pharmacist, family members, care givers, etc.) prior to discussing any issues regarding that client. If this release of information is refused, the case manager will continue to provide guidance directly to the client, and encourage them to talk with others in the support system. Documentation standards are in place to protect client confidentiality while maintaining the integrity of the information for reporting purposes. Formal, ongoing education and training in case management and ethics are provided to the case management team.

25. ACCESS FOR LOW-INCOME INDIVIDUALS AND FAMILIES

What percentage of this program's participants do you expect to be of low and/or moderate income?

80.0%

What framework do you use to determine or describe participant's or household income status? (check all that apply)

Number of children enrolled in free and reduced lunch

Individuals or families that report 0-50% of Dane County Median Income

Individual or family income in relation to Federal Poverty guidelines

Other

X

X

X

26. HOW IS THIS INFORMATION CURRENTLY COLLECTED?

Income level is part of the initial intake paperwork that is covered during a first-time visit. As there are no income guidelines for case management services, this is not critical information unless clients are requesting to be enrolled in specific programs, for which income limits are required (home chore, supportive home care) If these programs aren't requested, income levels remain private.

27. PLEASE DESCRIBE YOUR USER FEE STRUCTURE AND ANY ACCOMMODATIONS MADE TO ADDRESS ACCESS ISSUES FOR LOW INCOME INDIVIDUALS AND FAMILIES.

There is no fee structure for individuals who request to work with a case manager. All services are provided at no cost to the client or family. If assistance requested involves income eligibility criteria, based on that program, the case managers will work with those individuals to complete necessary applications for program enrollment.

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28. DEMOGRAPHICS

Complete the following chart for unduplicated participants served by this program in 2009. Indicate the number and percentage for the following characteristics. For new programs, please estimate projected participant numbers and descriptors.

PARTICIPANT DESCRIPTOR	#	%	PARTICIPANT DESCRIPTOR	#	%
TOTAL	450	100%	AGE		
MALE	135	30%	<2	0	0%
FEMALE	315	70%	2 - 5	0	0%
UNKNOWN/OTHER	0	0%	6 - 12	0	0%
			13 - 17	0	0%
			18 - 29	0	0%
			30 - 59	0	0%
			60 - 74	131	29%
			75 & UP	319	71%
			TOTAL AGE	450	100%
			RACE		
			WHITE/CAUCASIAN	414	92%
			BLACK/AFRICAN AMERICAN	23	5%
			ASIAN	9	2%
			AMERICAN INDIAN/ALASKAN NATIVE	1	0%
			NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	3	1%
			MULTI-RACIAL:	0	0%
			Black/AA & White/Caucasian	0	0%
			Asian & White/Caucasian	0	0%
			Am Indian/Alaskan Native & White/Caucasian	0	0%
			Am Indian/Alaskan Native & Black/AA	0	0%
			BALANCE/OTHER	0	0%
			TOTAL RACE	450	100%
			ETHNICITY		
			HISPANIC OR LATINO	5	1%
			NOT HISPANIC OR LATINO	445	99%
			TOTAL ETHNICITY	450	100%
			PERSONS WITH DISABILITIES	234	52%
			RESIDENCY		
			CITY OF MADISON	450	100%
			DANE COUNTY (NOT IN CITY)	0	0%
			OUTSIDE DANE COUNTY	0	0%
			TOTAL RESIDENCY	450	100%

Note: Race and ethnic categories are stated as defined in HUD standards

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29. PROGRAM OUTCOMES

Number of unduplicated individual participants served during 2009.	450
Total to be served in 2011.	500

Complete the following for each program outcome. No more than two outcomes per program will be reviewed.

If applying to OCS, please refer to your research and/or posted resource documents if appropriate.

Refer to the instructions for detailed descriptions of what should be included in the table below.

Outcome Objective # 1:	Seniors feel supported knowing that they can call their case managers with concerns and questions, allowing them to live independently.			
Performance Indicator(s):	75% of seniors who are receiving case management services will be able to have their concerns addressed and will be able to remain living independently.			
Proposed for 2011:	Total to be considered in	500	Targeted % to meet perf. measures	75%
	perf. measurement		Targeted # to meet perf. measure	375
Proposed for 2012:	Total to be considered in	525	Targeted % to meet perf. measures	75%
	perf. measurement		Targeted # to meet perf. measure	393.75
Explain the measurement tools or methods:	The case management program success will be measured in several ways. Data will be collected when client cases are closed, indicating an end in services, to review the reasons for service termination. A client satisfaction survey will be mailed to each case managed client in July to gather information and feedback directly from clients. Additionally, 30 case files will be randomly selected (10/case manager) at the beginning of the year and will be reviewed on a quarterly basis to monitor activity.			
Outcome Objective # 2:	Seniors are able to live independently with the coordination of supportive services and/or information and referral to community resources.			
Performance Indicator(s):	75% of seniors who contact the Coalition needing various information, assistance or referrals, will be assisted to make connections to maintain independence.			
Proposed for 2011:	Total to be considered in	1475	Targeted % to meet perf. measures	75%
	perf. measurement		Targeted # to meet perf. measure	1106.25
Proposed for 2012:	Total to be considered in	1550	Targeted % to meet perf. measures	75%
	perf. measurement		Targeted # to meet perf. measure	1162.5
Explain the measurement tools or methods:	Case Managers will track not only how people are hearing about the Coalition, but what the initial reason for their contact is (transportation, housing, etc.) so that trends can be identified and Coalition programming can address recurring themes in an effort to education older adults. 30 client files will be reviewed annually (10/case manager) for an estimation of the number of resources and/or services each client has used during that review time period that have been coordinated by Coalition case managers.			

**PROPOSAL REVIEW: Individual Staff Review for 2011-2012
For Community Resources Proposals to be Submitted to the
Community Services, Early Childhood and Senior Services Committees**

1. **Program Name:** Case Management
2. **Agency Name:** West Madison Senior Coalition
3. **Requested Amounts:** 2011: \$33,313
 2012: \$33,313

**Prior Year Level: \$36340
(\$32660 CR + \$3680 Supplemental)**
4. **Project Type:** New ☐ Continuing X
5. **Framework Plan Objective Most Directly Addressed by Proposed by Activity:**

☐ I. Youth Priority
☐ II. Access
☐ III Crisis

☐ VI Child(ren) & Family
X VII Seniors A1
6. **Anticipated Accomplishments (Proposed Service Goals)**
Serve 500 unduplicated clients in case management defined as clients that receive a home visit and have a functional and financial assessment completed. (92% will stay in their homes)
975 Individuals will receive information assistance or referrals
No Service hours goal number was provided.
7. **To what extent does the proposal meet the Objectives of the Community Development Division, Community Resources Program Goals and Priorities for 2011-2012?**

Staff Comments: This program clearly meets Program Area IV-Priority A-1- Provide case management activities that help seniors live independently by connecting them to needed services.
8. **To what extent does the proposal incorporate an innovative and/or research based program design that will have a positive impact on the need or problem identified?**

Staff Comments: It seems likely that this program will have a positive impact on individuals and families seeking this service. Staff have training and experience working with aging populations and service networks, service delivery is consistent with AAA case management standards. Outreach work proposed seems appropriate use of resources and seems to effectively utilize existing social networks.
9. **To what extent does the proposal include service goals and outcome objectives that are realistic and measurable and are likely to be achieved within the proposed timeline?**

Staff Comments: Service goals seem realistic given resources, structure and past performance , however from a contract management standpoint some consistency in language, measurement and outcomes between Senior Coalitions providing case management services would be advantageous. These issues could be addressed during the contracting phase by CDD staff.
10. **To what extent do the agency, staff and/or Board experience, qualifications, past performance and capacity indicate probable success of the proposal?**

Staff Comments: Current Board membership numbers, experience and diversity of expertise or representation seem adequate to provide appropriate oversight to organization. Agency has extensive history providing services in Madison. Contract goals consistently are met or exceeded, reports are complete and on time.
11. **To what extent is the agency's proposed budget reasonable and realistic, able to leverage additional resources, and demonstrate sound fiscal planning and management?**

Staff Comments: Budget is clear costs appropriate, funding seems appropriately diverse, fundraising goals seem realistic.

12. To what extent does the agency's proposal demonstrate efforts and success at securing a diverse array of support, including volunteers, in-kind support and securing partnerships with agencies and community groups?

Staff Comments: Agency utilizes volunteers in appropriate roles, appears to have appropriate and necessary partnerships and collaborations in place. NESCO's ability to provide programming for culturally specific populations benefits all senior providers in service network.

13. To what extent does the applicant propose services that are accessible and appropriate to the needs of low income individuals, culturally diverse populations and/or populations with specific language barriers and/or physical or mental disabilities?

Staff Comments: Proposed program accessible to low income populations, and staff have training and experience in working with AODA and mental health issues. The addition of the senior meal site at Lussier center has increased outreach to Black and Latino families in Wexford Ridge Neighborhood. Partnership with MOST mobile outreach to Seniors team helps case management team work with the mental health issues for many clients.

Questions:

- Clarify how unduplicated clients are defined in your agency-case management vs information and referral.
- Plans to increase capacity to serve non English speaking clients?

14. **Staff Recommendation**

☐ Not recommended for consideration

☐ Recommend for consideration

☒ **Recommend with Qualifications**

Suggested Qualifications: See questions above. Additionally, through contracting process, CDD staff will work toward some consistency amongst case management outcomes in Senior Case management services.