TITLE III B: CASE MANAGEMENT PROGRAM STANDARDS

Program Definition & Goal: Provide case management services for older adults residents of Santa Clara County which includes a comprehensive assessment of a frail older adult's needs to ensure access to vital services in the community allowing them to remain safely in their own home and avoid premature institutionalization.

Service Type: Registered Service

Unit of Service: 1 hour = 1 hour of service

Scope of Service & Funding

Funding available: $50,000.00
The maximum grant amount is $25,000.00.

Minimum Service Standard:

Units of Service: 1,500
Unduplicated Persons Served: 150

Area to be Served, contract 1: Santa Clara County, northern county

Area to be Served, contract 2: Santa Clara County, emphasis on services targeted at low-income seniors and/or older individuals with limited English-speaking abilities

Service Area Target Population: All contracts are required to provide services to all persons aged 60 and over.

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act. Reference 22 CCR § 7125 & 22 CCR § 7127.

Required Match: The minimum cash and in-kind match is 11.11%. Based on the available funding, the below cash amounts include the required match for Title III B Supportive Services.

For additional budgeting requirements read the 2020-2024 Request for Proposal Bidders Guide available on the Sourcewise website: http://www.mysourcewise.com/area-plan

Case Management
Program Specific Scope of Service:

1. Provider shall demonstrate that case management personnel meet the following education and experience requirement:

   Bachelor of Arts (B.A.) and three years of case management work experience with the elderly, or a master's degree from an accredited school of social work, psychology, counseling, rehabilitation, and one year of case management experience with the elderly.

Each case manager shall receive a minimum of one hour of case conferencing supervision monthly. This responsibility may be subcontracted and shall be provided by an individual with a graduate degree from an accredited school of social work, nursing, psychology, counseling, or rehabilitation. The supervision must be reflected in the budget.

2. Provider shall encourage coordination among case managers for sharing of resources, training activities, and referrals.

3. Each case manager shall coordinate service authorization and arrangement through the development and maintenance of a comprehensive list of resources available for seniors within the designated service area.

4. The following four activities can be recorded as 1 hour or unit of service:
    a. **Comprehensive Assessment:** To collect information about a client with multiple needs (social, environmental, physical or mental) and determine the necessary supportive or other appropriate services to meet those needs.
    b. **Care Planning:** To write an individualized plan of care and services under a case management system based on a comprehensive assessment of the client's condition and/or resources.
    c. **Service Authorization and Arrangement:** To obtain services according to an individualized care plan by coordinating existing services, authorization for payment of services, or purchase of services.
    d. **Case Monitoring:** To determine quality and effectiveness of services provided to a client according to an individualized care plan and to maintain periodic client contact to determine if change has occurred; and to take appropriate action as necessary.

5. Staff shall be trained and experienced in working with seniors who are in the greatest economic need (22 CCR § 7125) and social need (22 CCR § 7127). The skills to direct group activities, facilitate discussion, provide informal counseling, and coordinate community resources and linkages for participants are required.

6. **Objectives:** The provider is required to demonstrate that each of the following programs areas are successfully completed within the awarded fiscal year from July 1, 2020 – June 30, 2021. Included in the Older American Act Application for Funding, list at least one measurable objective for each of the following program areas; reaching the target population, staffing and volunteers, coordination with other agencies, public information, obtaining contributions, client input, and fundraising.

Targeting

Service providers must have established methods, other than use of means testing, to provide services to all persons aged 60 and over.

Service providers must show intent and methodology to serve the needs of:

- Age 75+
- Low Income (federal poverty)
- Minority
- Living Alone

Demonstrate serving the target population (at-risk socially/economically), keeping in line with the intent of the Older Americans Act.

Staffing & Volunteers

Service providers must demonstrate recruitment and training of staff & volunteers to support the program.

Staffing & Volunteers goal must describe specifically how many staff and volunteers will be required to support the Older Americans Act program and the kind of task that will be performed by volunteers.

Coordination

Service providers must form and administer cooperative agreements with other agencies to ensure comprehensive service delivery and avoid unnecessary duplication.

Public Information/Outreach

Service providers must have planned information and outreach activities, including distribution of printed materials advertising the program.

Client Input

Service providers must have procedures in place for obtaining the views of the participants of the service being provided, including a written and distributed client grievance procedure.

Describe the process by which regular client input is received and areas that are monitored for quality service.

Client Contribution

Service providers must provide clients with the opportunity to voluntarily contribute to the cost of the program.

Describe the process for collecting voluntary client contributions including (a) how clients will be informed of the opportunity to contribute to the cost of the service, (b) the amount of suggested client contribution and how it was determined and (c) the method used to collect and record client contributions to ensure confidentiality.

Reporting Requirements:

As a "registered service" detailed client information for the client is required to be collected and reported if your agency plans on providing service in these areas. The agency is required to use Q Continuum ("Q"), Sourcewise's database program, to report on services and client characteristics. The agency must have an internet-accessible computer. Q costs, installation, and training will be provided by Sourcewise.

Programs are required to collect information on Name, Zip Code, and Birth Date in order to establish eligibility. Reporting requirements include unduplicated client counts including client demographic characteristics, ADLs, IADLs, and units of service.

The following required characteristics must be collected from each client and entered to the Data Reporting Software, Q Continuum ("Q"):

- Unique participant ID
- Name
- Birthdate
- Zip Code
- Rural Status
- Gender
- Sex at Birth
- Sexual Orientation
- Race
- Ethnicity
- Poverty Status
- Living Status
- ADLs/IADLs Assessment