

# Dane County Client-Centered Case Management Program

*(For senior adults 60 years and older)*

## Promoting Independence for Senior Adults



# Aging Network

Dane County is fortunate to have a vast network of aging services and resources. Many are interdependent public, private partnerships that are community-based.

The Case Management Program is a partnership between Dane County government and geographically-defined agencies. Dane County funds this program through tax levy. The purpose of this partnership is to promote senior adult independence within our community for as long as possible. Dane County's Case Management Program is a contracted service of the Area Agency on Aging (AAA) of Dane County.

Dane County opened an Aging & Disability Resource Center (ADRC) in late 2012 which provides short-term Information & Referral services. AAA & ADRC work collaboratively to meet the short and long-term needs of seniors in Dane County.



**County Client-Centered**  
**Case Management Program**  
*(for adults age 60+)*

# What Are We?

Organized group of trained Case Management professionals whose primary goal is to provide older adults in Dane County the support they need to achieve and maintain optimum independence in their community through the assessment of need and the coordination and monitoring of community-based services

- Umbrella organization is the Area Agency on Aging (AAA) of Dane County (Department of Human Services)
- Case Managers follow the National Association of Social Workers' Code of Ethics and adhere to Case Management Standards as approved by the AAA Board of Directors

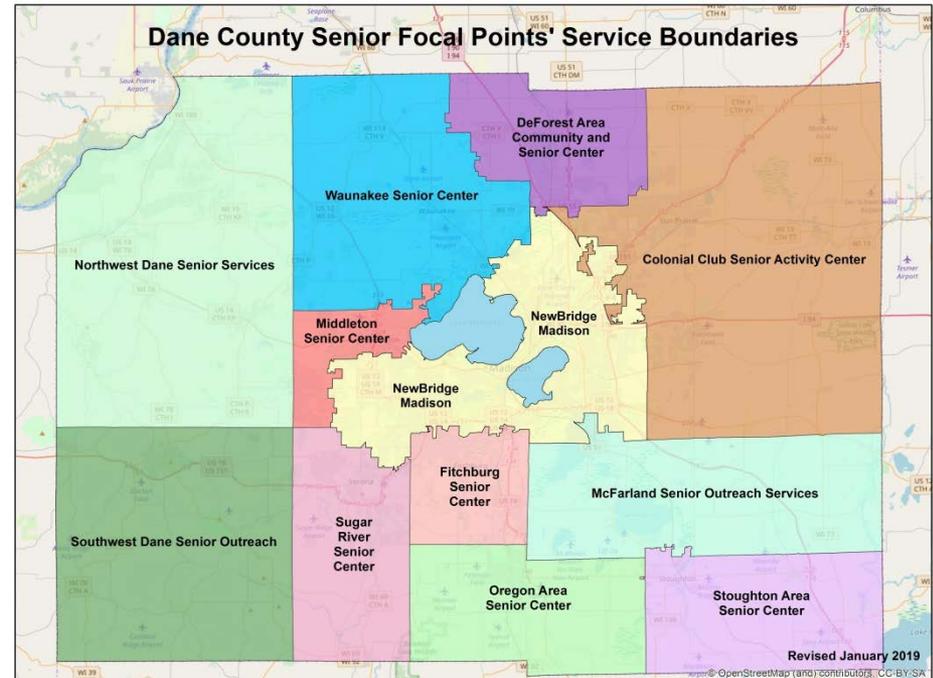


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# Where Are We?

Located in 12 agencies, called Focal Points, throughout Dane County

- In addition to Case Management Services, Focal Points also offer a senior nutrition program—in group settings and home-delivered meals
- Each Focal Point has designated service areas

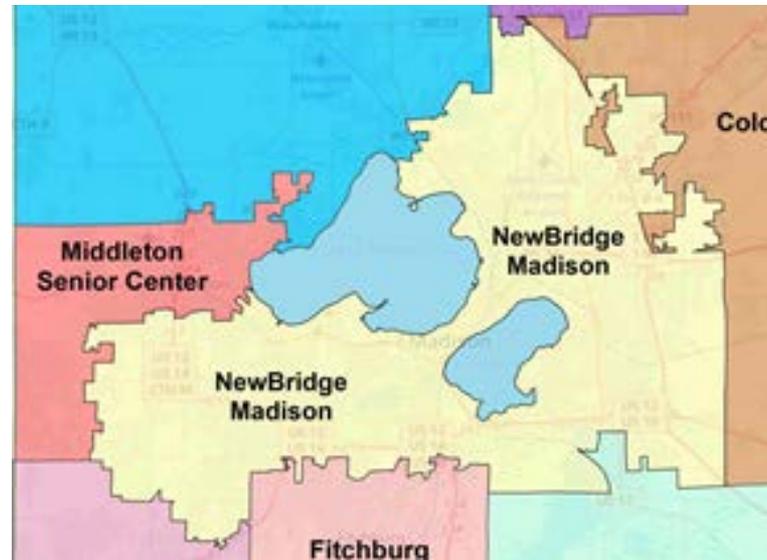


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# Where Are We?

Effective 1 January 2019, four Madison Senior Coalitions merged into one agency. East Madison/Monona Coalition of the Aging, North/Eastside Senior Coalition, South Madison Coalition of the Elderly, and West Madison Senior Coalition became NewBridge Madison Inc.

- Satellite offices located in North, East, South & West areas of the City of Madison



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# Senior Focal Points

Colonial Club Senior Activity Center

DeForest Area Community & Senior Center

Fitchburg Senior Center

McFarland Senior Outreach Services

Middleton Senior Center

NewBridge Madison

Northwest Dane Senior Services

Oregon Area Senior Center

Southwest Dane Senior Outreach

Sugar River Senior Center

Stoughton Area Senior Center

Waunakee Senior Center



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# Who may utilize this program?

- Any adult age 60 years and older living in Dane County
- Recipients must fall below 240% of the Federal Poverty Level unless additional funding is available at each Focal Point
- Anyone desiring information regarding services and programs for senior adults may contact Focal Points, Aging & Resource Center (ADRC) of Dane County, or Area Agency on Aging (AAA) of Dane County



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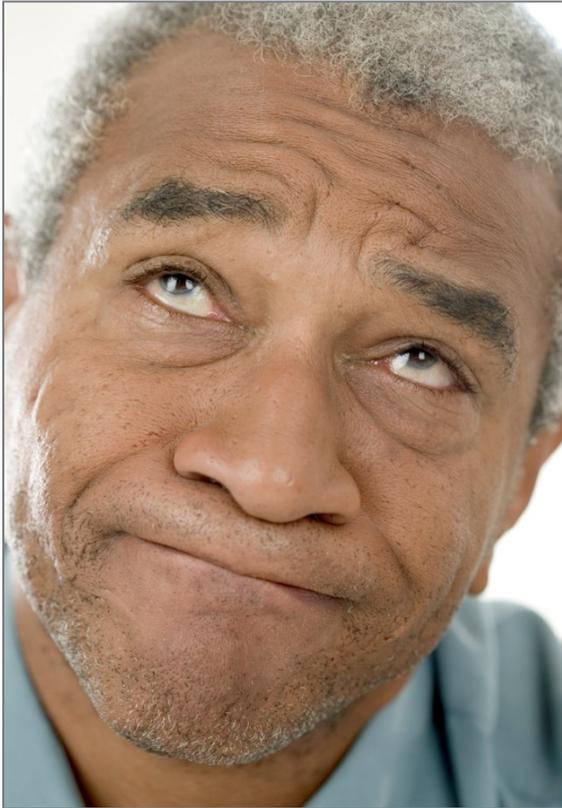
# Exceptions: 2019

- Middleton Senior Center and Stoughton Area Senior Center serve adults age 55+ living in their service areas; Fitchburg Senior Center, NW Dane Senior Services & Sugar River Senior Center also serves adults age 55-59 on a limited basis (high needs & low funds)
- NewBridge does not have funding to provide case management services to seniors above 240% of the Federal Poverty Level. Seniors over these income limits are referred for private case management services



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# Case Manager's Role



Case Managers assess the needs of the client and the client's family (when appropriate) and arrange, coordinate, monitor, evaluate, and advocate for multiple services to meet specific complex needs and preferences

- They conduct home visits to assess the needs of each senior adult and then develop individualized service plans for ongoing/ long-term services (the term “home” includes houses and apartments but not nursing homes or assisted living facilities)
- They provide professional assistance in a confidential manner



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# Case Manager's Role



Client-centered case management is based on the recognition that a trusting and empowering direct relationship between Case Manager and client is essential to facilitate a client's use of services along a continuum of care and to restore or maintain independent functioning to the fullest extent possible. It requires the Case Manager to develop and maintain a professional relationship with the client, which may include linking the client with systems that provide needed advocacy, services, resources, and opportunities.



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# Referrals

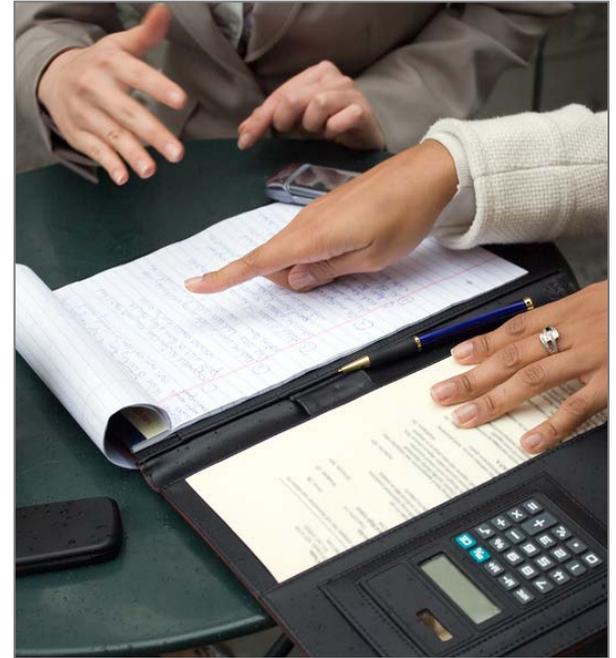
Referrals to the client-centered case management program come from individual older adults and their families, neighbors and friends, social service agencies (including ADRC), medical clinics, clergy, hospitals, and other professionals. During the referral process, the Case Manager attempts to gather initial information from the client in order to determine what assistance is needed.



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# Assessment

Assessment is conducted during face-to-face meetings with the client, and information is gathered to determine whether the person needs on-going case management services. If appropriate, Client Intake and Functional Assessment forms are initiated. Requests for services are followed-up in a timely manner to determine eligibility for client-centered case management services.



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# Service Plan



The primary goal of client-centered case management is to optimize client functioning by a thorough assessment of needs. Using this assessment, the Case Manager, with the client's input, develops a plan that will provide services in the most efficient and effective manner. Goals are developed and monitored.



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# Information & Assistance (I&A)

This is a service of the Aging & Disability Resource Center (ADRC) of Dane County. It provides information to the general public about resources and programs in areas such as: disability and long-term care related services and living arrangements, health, adult protective services, employment and training for people with disabilities, transportation, home maintenance, and nutrition. ADRC I&A activities are not to exceed a period of 90 days and are thus not considered on-going case management.



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# Focal Point Case Management

Face-to-face meeting with senior to review situation

Client Intake & Assessment Form completed

Determination of long-term case management needed (no time limit)

Service Plan Goals developed

Refer, arrange, and coordinate services

Monitor progress of goals

# ADRC Information & Assistance

Provide information & answer questions

Make short term issue identification – limited to 60-90 days maximum  
(continuation of long-term services are referred to Focal Points)

Help people understand long-term care services and choices available

Provide entry point for publically-funded long-term care options

Make available Disability & Elder Benefit Specialist services



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# Program Funding



- The Case Management Program is funded by Dane County, local communities, and United Way of Dane County (for some of the Focal Points)
- Dane County funds Case Management Services that target senior adults with monthly income falling below 240% of the Federal Poverty Level
- Focal Point Case Management is available to senior adults with monthly income above the 240% of poverty level—through other funding resources
- Donations are encouraged and welcomed



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# County Funding

Year	%	Total
2013	41%	\$727,993
2014	40%	\$728,493
2015	45%	\$745,610
2016	40%	\$774,654
2017	39%	\$809,701
2018	39%	\$857,514
2019	TBD	\$967,327



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# Results

Year	Clients	Service Hours
2013	2,243	20,053
2014	2,325	20,081
2015	2,695	19,666
2016	2,927	22,631
2017	3,412	24,085
2018	3,163	24,824



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# Evaluation—Customer Satisfaction

- Prior to 2014, Focal Points conducted annual surveys using their own forms
- In 2014, DCDHS worked with Focal Points to develop a uniform survey instrument; 100% of clients were surveyed
- 2015 - 2017 DCDHS conducted annual surveys of a random sample of clients
- Starting in 2018, DCDHS conducts biannual surveys of a random sample of clients



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