

Agenda Item Number 12.D.

Senior & Disabled Services Highlights for 2005-06

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Action Recommended: None, Information only

Introduction:

Over the course of the past six years, the world in which we live has changed significantly. For our nation, the 21st century has brought with it difficult challenges and exciting new rewards. Senior & Disabled Services has not been immune to these events and new dynamics. The events of September 11, 2001, the downturn of the economy in 2002 and the more recent natural disasters have all had an impact on how S&DS does business. The Highlights of Program Year 2005-2006 illustrate the impact of these changes, and the continued importance of the services we deliver. They can be summarized in four primary areas:

- Planning for the Future: Emergency Preparedness Efforts
- Working Smarter: Use of Technology
- Doing More with Less: Maximizing Limited Resources
- Effective Service Delivery: Collaboration, Transparency and Accountability.

S&DS' major accomplishments in these four areas are described in the following narrative. Program statistics for FY2005-06 are also included.

Planning for the Future: Emergency Preparedness Efforts

The catastrophic events experienced over the past few years have generated a renewed interest in emergency preparedness planning, both at the personal and organizational level. During FY2005-06, S&DS focused its efforts on three areas:

A. Training

Four S&DS staff attended trainings on Disaster Preparedness, specifically targeting the needs of seniors and people with disabilities. In particular, staff were able to learn important lessons from personnel that had first hand experience with a disaster, such as Hurricanes Katrina and Rita. They returned with useful information and important tools to assist S&DS with its emergency planning efforts.

B. Updating S&DS' Business Continuation Plan

Six years ago, in preparation for Y2K, S&DS committed much time and effort in the creation of a solid Business Continuation Plan should a disaster occur. While the plan is very thorough, S&DS determined it was time to review and update. Using the newly acquired tools received at the trainings, S&DS staff began the process of evaluating the current S&DS Business Continuation Plan and recommending updates and/or improvements.

C. Collaboration with Community Partners

One of the key lessons learned from the trainings was that networking with community partners prior to a disaster is critical, and will produce huge dividends. During FY2005-06, S&DS staff networked with local governmental and non-profit human services agencies through the Emergency Response Planning Group, a sub-committee of the United Way Agency Directors Organization. Additionally, S&DS met separately with Lane County Public Health officials to address the unique issues facing seniors and people with disabilities in the event of a disaster.

Working Smarter: Use of Technology

During FY2005-06, S&DS continued to be recognized as a statewide leader amongst human service agencies for its creative and efficient use of technology. Examples include work in support of Adult Protective Services, Medicare Modernization Choice Counseling, and Adult Foster Care Licensing.

A. Technology to Support Adult Protective Services Activities

During FY2005-06, several upgrades to S&DS' Client Tracking System (CTS) were accomplished. First, in consideration of the highly confidential work our Adult Protective Services staff does, the data base was upgraded to allow staff to create parallel investigative narratives when dealing with special circumstances, such as law enforcement investigations. Second, in response to new requirements from the State, the system was upgraded to allow staff to automatically fax required forms using existing data from our application. While other agencies must

spend time manually completing the forms and faxing them, S&DS' system allows our staff to focus on client service rather than paperwork. In July 2005, a Legislatively mandated staffing study by an independent contractor recognized S&DS' Client Tracking System as cutting-edge, stating in its report, *“DHS should initiate planning for a case management system useful to both workers and to the state central office for case monitoring. Lane County has a “Client Tracking System” that supports both case management and program management. As one possible alternative, Seniors & People with Disabilities should evaluate the capabilities of that system for statewide expansion.”*

B. Technology to Support Medicare Part D Choice Counseling

Instead of diving into this complicated, short-term project without considering staff organization and data needs, S&DS designed a set of spreadsheets that not only made client tracking easier for staff, but automatically collected relevant statistics needed by management to over-see the project. According to the supervisor, LCOG was often the only agency in the state capable of supplying certain Medicare Part D-related statistics requested by the State and Legislators.

C. Technology to Support Adult Foster Care Licensing

Rather than asking staff to do hand-tallies from paper files, custom management reports from State and local databases were created. One example of this is the new Foster Care Medicaid Percent calculations that allow LCOG to comply with new State requirements for tracking and charging to Medicaid funds. LCOG chose to use our developer to create a report that pulls data from various State and local databases to calculate the necessary statistic automatically rather than hand-calculate this information every month or quarter.

Doing More with Less: Maximizing Limited Resources

A. Maximizing Limited Resources by Utilizing Volunteers

As the Area Agency on Aging for Lane County, S&DS receives funding through the Federal Older Americans Act to help people over 60 years of age maintain independent living in their own home. Two S&DS programs – the Senior Meals Program and the Senior Connections Program – receive the primary share of funding through the Older Americans Act allocations. Volunteers are a critical link in the service delivery chain of these programs. Program accomplishments, participant demographics and the impact of volunteer hours are highlighted in the following section.

Senior Connections Program

Program Accomplishments

- 1,889 People served (unduplicated number)
- 1,832 People received assistance with care coordination
- 1,030 People received help applying for the Low Income Energy Assistance Program (LIEAP)
- 293 People eligible for door-to-door transportation
- 33,767 Calls/contacts providing information and assistance
- 6,867 Requests from unpaid family caregivers for information and assistance
- 6,418 Hours of respite care provided for family caregivers
- 215 Family caregivers received help with respite care
- 19 Group training sessions offered to family caregivers
- 57 Family caregivers (unduplicated number) attended the training sessions
- 37 Family caregivers received financial assistance to purchase medical supplies, adaptive equipment, dental care, household cleaning, and small home repairs.

Participant Demographics

- 86% of clients served are over the age of 65
- 22% of clients served are over the age of 85
- 46% of clients served are 125% of federal poverty level or below
- 69% of clients served are female
- 67% of clients served live in small towns or rural area

Value of Volunteer Hours

- 68 Senior Connections volunteers provided 3,765 hours of service
- Escort Drivers gave 1,804 hours of volunteer service and provided 1,429 assisted one way rides
- 34 Senior Companion volunteers gave 34,885 hours of companionship and provided 24,608 one way rides
- 43 Elder Help volunteers gave 4,340 hours of service
- 11 Americorp volunteers provided 228 hours of service to help 195 seniors in rural Lane County access the Medicare Part D Prescription Drug Benefit
- 156 total number of volunteers matched with Senior Connections participants
- 45,022 total hours of volunteer services provided, including transportation, socialization, shopping, and companionship
- \$707,296 Value of volunteer hours, per State of Oregon average.

Senior Meals Program

Program Accomplishments

- 69,170 Meals served: Dining Rooms
- 80,250 Meals delivered: Meals on Wheels
- 149,142 Total meals served through Senior Meals Program

- 1,033 Participants: Dining Rooms (unduplicated number)
- 739 Participants: Meals on Wheels (unduplicated number)
- 1,772 Total number of participants: Senior Meals Program
- 10 Communities served: Dining Rooms
- 8 Communities served: Meals on Wheels

Participant Demographics

- 17% of Dining Room participants are over 85 years of age
- 32% of Meals on Wheels participants are over 85 years of age
- 41% of Dining Room participants have income below 125% poverty level
- 40% Meals on Wheels participants have income below 125% poverty level
- 62% of Dining Room participants are female
- 66% of Meals on Wheels participants are female

Value of Volunteer Hours

- 303 Total number of volunteers: Senior Meals Program
- 18,113 Volunteer hours: Dining Rooms
- 11,657 Volunteer hours: Meals on Wheels
- 29,770 Total number of volunteer hours: Senior Meals Program
- \$467,686 Value of volunteer hours, per State of Oregon average.

B. Maximizing Limited Resources through Fund Raising

Recognizing that federal funding continues to decline while the need for services continues to rise, the Senior Meals and Senior Connections Programs must supplement program dollars through fund raising. During FY2005-06 the Senior Meals Program raised \$143,285 in new donations to support the program. Additionally, the Meals on Wheels Combined Campaign (in partnership with Red Cross) contributed a net total \$61,325. These gifts are primarily in response to direct mailings, scheduled regularly during the year. Most gifts come in the form of checks, however this year an Electronic Funds Transfer program was established. The Senior Meals Endowment generated an additional \$8,225 in gifts this year; its current balance is \$141,161 and it generated \$5,511 in interest which was distributed to the program. The goal of the endowment is to generate sufficient

income on an annual basis to sustain program services. To achieve this goal, the endowment's corpus needs to grow to several million dollars.

The Senior Connections program is still fairly new to the fund raising arena. However, a significant increase in the level of funding through donations was experienced. During FY2005-06, a total of \$15,222 was received. This is a substantial increase from FY2004-05, which saw total donations of \$4,175.

C. Maximizing Limited Resources through Partnerships

As the following examples illustrate, S&DS believes in partnering with other agencies as much as possible to accomplish improved service to Lane County seniors and people with disabilities.

Roll-out of Medicare Part D

- In January 2006, Medicare Part D Prescription Drug Coverage was implemented. During the implementation phase, S&DS played an important role in organizing the Medicare Part D Community Partners Coalition. S&DS coordinated and facilitated monthly meetings of the 10 member Medicare Part D Steering Committee, which focused on providing information, education, and assistance to allow seniors to make informed decisions about Medicare Part D.
- S&DS Senior Connections hired a temporary Medicare Outreach Coordinator to provide comprehensive Medicare part D choice counseling information and education through presentations at local businesses, written materials, media coverage, and word of mouth.
- Outreach activities include:
 - 21 presentations to local agencies and businesses
 - 1,984 attendees at presentations
 - 4 newspaper articles
 - 5 interviews: 2 TV, 3 Radio

Contracts with local hospitals and the Housing Authority

S&DS contracted with Sacred Heart and McKenzie-Willamette Hospitals for an on-site intake case manager to assist patients with application for Medicaid services. Additionally, S&DS successfully completed its contract with the Housing Authority to provide a case manager to provide education and referral to residents of public housing facilities owned and operated by the Housing Authority.

AmericaCorps*Vista Volunteer

S&DS Senior Connections served as a placement site for a Clara Barton AmericaCorps*Vista member. The VISTA Member began her one year service

commitment beginning in 8/05. The VISTA member was successful in assisting Senior Connections staff to begin to develop and implement a resource development plan for Senior Connections.

Effective Service Delivery: Collaboration, Transparency, and Accountability

A. Support for LCOG's Senior & Disabled Services Advisory Councils

- S&DS staff provided active support to LCOG's Senior Services and Disability Services Advisory Councils. Staff also supported the work of the Councils' six standing committees.
- Six new members were recruited, screened, and appointed to the Councils (SSAC - 2 new members; DSAC - 3 new members). In addition, one new Community Representative Member was appointed to the Disability Services Council for a one-year term.
- The Senior Meals Program Advisory Committee met on a quarterly basis, providing advice to staff on the operation of the program.
- Members of the Senior and Disability Services Advisory Councils sponsored four Legislative Conversations with members of the State Senate and House Districts to discuss the needs and interests of seniors and people with disabilities.
- The 2006-07 Update to LCOG's 2003-07 Area Plan on Aging and Disability Services was developed, reviewed by the public at one hearing, and adopted by the Board of Directors.

B. Inter-agency Collaboration

- To promote inter-agency cooperation on behalf of seniors and people with disabilities, staff continued to represent S&DS on a large number of committees, councils, and groups within Lane County, including: Lane County Multi-Disciplinary Team; the Community Response Team; IMPACT; Eugene Downtown Safety Committee; The Lane Advisory Board; United Way Research and Evaluation Committee; the Domestic Violence Coalition; the Lane Human Services Network; LaneCare's Executive, Quality Assurance, and Service Delivery Committees; LTD's Special Transportation Advisory Council; Lane County Senior Programs Coalition; Florence Senior Network; the City of Florence's Transit Advisory Committee; and the Florence Area Coordinating Council.
- S&DS staff also continued to work closely with law enforcement agencies throughout the county, including local police departments, the Lane County Sheriff's office, and the Oregon State Police.

- S&DS contracts with others for the provision of the following services; Senior Legal Services; Ombudsman Recruiting and Screening; Family Caregiver Support Group and Training; In-Home Services; Meals; the Elder Help Program; Money Management; and Escorted Transportation.

C. Performance on Medicaid Funded Service Delivery

Due to reductions the Oregon State Legislature implemented during its 2005 Legislative Session, S&DS began FY2005-06 with plans to reduce its workforce by sixteen positions. This resulted in nine staff lay-offs, as six positions were vacant and two staff members opted to job share one position. A few programs were eliminated, however most of the clients continued to access services through S&DS. Remaining staff absorbed additional workload to accommodate the cuts, and the agency reorganized responsibilities to maximize staff expertise. Of the nine staff in lay-off status, S&DS was able to offer temporary positions to those interested using limited funding for Medicare Part D counseling. Notwithstanding the challenges associated with significantly reducing the number of staff, S&DS continued to deliver needed services to senior citizens and people with disabilities in Lane County throughout the year, as described below.

Special Project: Medicare Part D Counseling

In an effort to assist Medicaid clients with the new regulations and changes in prescription coverage, S&DS hired thirteen temporary staff members to provide “Choice Counseling”. These staff received special training on Medicare Part D and how to objectively provide clients with the information needed to choose the prescription drug plan that would best meet their needs.

Between November 1, 2005 and December 31, 2006,

- 6,700 clients who have both Medicare and Medicaid were offered assistance by phone, mail, or office visits
- 3,500 clients provided S&DS Choice Counselors with information for entry into the Medicare Web Tool for coverage comparison of Medicare Prescription Drug Plans.
- The unit also collaborated with Lane County nursing homes, foster homes and partner agencies by conducting trainings and trouble shooting enrollment problems.

Between January 1, 2006 and June 30, 2006, S&DS Choice Counselors received 930 complaints regarding the Medicare Part D coverage. The complaints involved issues such as inappropriate billing, required transition benefits not provided, clients dropped by plans for no apparent reason, no record of enrollment activity which delayed medication coverage, automatic enrollment into a different plan than the one chosen, loss of coverage due to Private Health Insurance, and

inaccurate formulary information on the Medicare Web Tool. As a result of S&DS' Choice Counselors' work with clients, pharmacies, Medicare, Prescription Drug Plans, and the Department of Human Services, the majority of the complaints were resolved.

Eligibility and Case Management Services: Screening and Intake

Monthly averages for FY2005-06 screening and intake activity include,

- 400 screening calls per month, with 224 (56%) for Food Stamps and medical coverage and 176 per month (44%) for assistance with long term care needs.
- In addition to phone calls, S&DS also offers screening services for people that drop by the office, a.k.a. "walk-in screenings". An average of 113 walk-in screenings per month was seen in FY2005-06. Trends indicate that walk in screenings are higher in the fall and spring months
- 141 intakes for Food Stamps and medical coverage were completed each month, for an annual total of 1,699.
- An average of 112 intakes for assistance with long term care was completed each month.

Eligibility and Case Management Services: Ongoing Casework

- In June 2006, 11,871 residents of Lane County were receiving Food Stamp and/or Medicaid assistance.
- The average caseload for S&DS Eligibility Specialists was 487.
- Additionally, 2,609 people were receiving Medicaid assistance with their long term care needs. Out of the 2,609 people, 1,152 (44%) were receiving in-home assistance, 329 (13%) lived in an adult foster home, 627 (24%) lived in a community-based licensed facility such as a residential care or assisted living facility, and 501 (19%) resided in a nursing home.
- The average caseload was 89 for in-home Case Managers and 124 for facility-based Case Managers.
- 134 people were eligible for the Oregon Project Independence Program, a state-funded program that helps people remain in their own home with a small amount of in-home assistance.
- Even with high caseloads, S&DS performed extremely well in the monthly Food Stamp Reviews mandated by the State of Oregon. Our average accuracy rate was 95.65%, which was above the statewide average.

Adult Protective Services

The S&DS Adult Protective Services unit consists of six Adult Protective Services Case Managers. However, during FY2005-06 the unit operated with five Case Managers for most of the year due to budget issues and the temporary re-assignment of one staff person.

Referrals

- 1,736 referrals received
- Referral types (categorized by the living situation and/or the type of service):
 - 1,240 Community / In-Home
 - 189 Nursing Facility
 - 138 Residential Care Facility
 - 63 Adult Foster Home
 - 53 Home Care Worker
 - 52 Assisted Living
 - 1 Contract In-Home Service
- Referral Summary:
 - 45% resulted in an investigation
 - 27% offered information / filed for future reference as did not meet criteria for investigation per Oregon Administrative Rules
 - 24% referred elsewhere
 - 3% duplicate referral

Investigations

- 781 investigations completed
- Abuse Investigations by Abuse Types:
 - 30% Neglect by Caregiver
 - 25% Financial Exploitation
 - 15% Self Neglect
 - 14% Verbal Abuse
 - 9% Physical Abuse
 - 4% Sexual Abuse
 - 3% Abandonment

Summary Analysis

Overall, the number of Adult Protective Services referrals decreased by 104 from FY2004-05. As a result, the number of investigations also decreased, by 234. Interestingly, Florence investigations were up by 45%. Many of the investigations involved detailed and complex issues. Several resulted in criminal prosecution.

Adult Protective Services staff participated in numerous community partnerships such as facilitating the Lane County Multi-Disciplinary Team, the Community Response Team, Domestic Violence Council, the Continuing Care Forum and the Governor's Task Force on Elder Abuse. Adult Protective Staff also conducted multiple trainings including sessions for the police cadets, licensed facilities, hospital emergency rooms, emergency medical services, social service groups, community organizations, and the Western Oregon Conference on Adult Protective Services.

Provider Services

Licensing and Monitoring of Adult Foster Homes

- 112 Commercial Homes, with a total of 479 beds in Lane County
- 124 Relative Foster Homes
- 14 Limited License Adult Foster Homes
- 6 Enhanced Care slots licensed
- 6 new Adult Foster Homes opened in 2005-06
- 8 Adult Foster Homes closed in 2005-06

Each year all Adult Foster Homes are re-licensed, with mid-year monitoring visits for some. S&DS Licensing and Monitoring staff offers monthly trainings to current or potential providers. An identified goal for next year is to recruit more Adult Foster Homes for the Florence area, as there are currently only six.

Criminal History Checks

- 4,402 criminal history checks completed on Adult Foster Home providers, Home Care Workers, and Senior Connections Volunteers
- 2,278 informal phone conferences completed
- 58 face to face informal hearings
- 0 formal hearings
- S&DS' Criminal History Unit successfully completed the LEDS audit and re-certification.

Home Care Workers

The S&DS' staff responsible for processing applications of Home Care Workers, entering the pay vouchers, monitoring performance and matching in-home workers with clients worked diligently to accomplish the following:

- Processed 653 applications for certification as a Home Care Worker
- All applicants must attend a three hour orientation
- 273 applicants were denied, primarily due to criminal history
- Currently there are 1,337 active Home Care Workers in Lane County

- S&DS staff processed semi-monthly pay vouchers for Home Care Workers, totally \$8,323,400 for the year.

Support Services

S&DS Administrative Support Units offer critical assistance towards the accomplishment of our mission, including phone, mail and transportation support.

- On average, 206 calls are received per day, 1030 per week, and 4,429 per month
- Annual re-determination packets are mailed to over 9,000 clients
- 83,434 medical transportation rides were arranged through S&DS during FY2005-06
- 3,489 bus passes and 702 bus tokens were issued in FY2005-06 as a cost effective means of providing medical transportation for people with more than five medical appointments per month
- 2,510 Oregon Trail Cards were issued
- \$468,334.88 was received in client reimbursement to the State of Oregon.