

(Confidential information redacted)

**COUNCIL ON AGING, SILICON VALLEY**  
**Application for Older Americans Act Funding**

Agency: Community Services Agency of Mountain View and Los Altos

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**PROGRAM DESCRIPTION**

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**1. Service Delivery**

(a) CSA's Senior Case Management (SCM) program helps functionally impaired seniors obtain the services they need to promote and maintain their optimum level of functioning in the least restrictive environment. SCM staff perform initial assessments, develop a care plan, arrange for appropriate services and benefits, provide information and referrals, and, when needed, advocate for the client (such as on doctor visits). Case managers conduct ongoing monitoring to ensure that clients are receiving the services they need.

The target population for this program is low-income, frail, homebound seniors who are at risk for premature institutionalization. CSA conducts a number of outreach efforts to identify seniors in Mountain View, Los Altos, and Los Altos Hills who may be eligible for SCM. At the Mountain View and Los Altos Senior Centers, we give presentations, take referrals, and conduct related case management activities. We also speak to faith communities, ethnic groups, caregiver associations, and other groups. We arrange for articles about CSA's senior services programs to appear in local newspapers, and we distribute brochures to local hospitals, public libraries, faith communities, and ethnic markets. SCM staff also coordinate closely with other CSA employees to identify potential SCM clients, and to share resources that could benefit our clients.

(b) The delivery of SCM services typically begins with a home visit. A case manager conducts Activities of Daily Living (ADL), Instrumental Activities of Daily Living (IADL), Nutritional Risk, psychosocial, and in-home safety assessments. When indicated, a Depression Survey and/or Mental Status Exam is also given. Working with the senior and his/her family, the case manager then develops a case plan with time-specific, measurable goals and objectives. Clients are initially contacted weekly or every other week to ensure that services are being provided. After that, they are contacted at least every six months to ensure that the situation remains stable.

Volunteers assist with the delivery of ancillary Senior Case Management services, helping our seniors remain in their own homes and stay connected to their communities. These volunteers provide short-term and ongoing non-medical assistance such as escorted transportation to medical appointments, grocery shopping, and friendly visiting.

(c) During the initial telephone intake session, clients are screened to determine the immediacy of their need. SCM staff prioritize cases based on the following criteria: (1) cases involving alleged abuse and/or neglect; (2) seniors who are unable to meet their basic physical needs (such as preparing meals) due to mental confusion, medical condition, or mobility impairment; (3) seniors whose caregivers are in need of respite. Clients assessed to be very high-risk are seen within 24 hours.

To be eligible for SCM, potential clients must be at least 60 years old. They must also have impairments in Activities of Daily Living (bathing, eating, walking, etc.) and/or Instrumental Activities of Daily Living (preparing meals, taking medications, etc.). We request income data, but do not require proof of low-income status to render service.

Currently, xx% of SCM clients are age 75+, at least xx% are low income (the other xx% declined to state), xx% are minorities, xx% live alone, and xx% have impairments in both ADLs and IADLs. (The minority breakdown is x% Hispanic, x% Asian, x% Hawaiian/Pacific Islander, x% African American, and x% other.) We continue to conduct community outreach efforts targeted to lower-income and ethnic-minority seniors.

## 2. Goals and Objectives

Program Area	Objective	How Measured
Target Population	Increase the SCM caseload by xx% (from xx to xx frail homebound seniors) and increase the ethnic diversity of our client population by xx% by conducting targeted community outreach to local faith communities, ethnic markets, affordable housing complexes, mobile home parks, and Brown Bag participants. (The Brown Bag program provides weekly delivery of free groceries to low-income seniors.)	Comparison of client registration data and case records for FY 2010-11 vs. FY 2011-12
	Provide service to at least xx low-income seniors (xx% of total clients served).	Same
	Provide monthly information and referral services at the Mountain View and Los Altos Senior Centers to increase public awareness about senior services offered through CSA.	Same

<p><b>Staffing &amp; Volunteers</b></p>	<p>Continue to employ xx full-time case managers who possess baccalaureate degrees in social work or psychology.</p> <p>Provide each case manager with xx hours of direct supervision each week.</p> <p>Provide SCM staff with xx external and xx in-service training opportunities to increase their knowledge of evidenced-based best practices that can enhance their case management skills.</p> <p>Recruit and train xx new volunteers, bringing the total to the xx volunteers needed to fully support the Senior Case Management program.</p> <p>Conduct an annual volunteer training to ensure that volunteers understand their roles and responsibilities and are knowledgeable about the facts and myths of aging. xx% of volunteers who participate in the training will report an increase in knowledge of healthy aging.</p>	<p>Timecards and payroll records</p> <p>Meeting notes and staff reports</p> <p>Workshop and in-service training reports; annual case-record quality reviews</p> <p>Comparison of volunteer logs for FY 2010-11 vs. FY 2011-12</p> <p>Pre- and post-training tests</p>
<p><b>Coordination</b></p>	<p>Partner with other local service providers to conduct xx presentations on topics of interest to active older adults and inform them about senior health and wellness issues. xx% of participants will report an increase in knowledge about health and wellness issues.</p> <p>Secure a Memorandum of Understanding with Avenidas Senior Day Health to coordinate the assistance of shared clients and avoid duplication of services.</p> <p>Co-sponsor a Senior Resource Fair with the Mountain View Senior Center, El Camino Hospital, and “Home Instead” Home Care to enhance seniors’ knowledge of local resources for maintaining and enhancing their health.</p>	<p>Presentation evaluation and health issues knowledge survey</p> <p>Signed MoU with Avenidas</p> <p>Event evaluation and health issues knowledge survey</p>

<p><b>Public Information and Outreach</b></p>	<p>Conduct xx community outreach events, including presentations to faith communities and senior groups.</p> <p>Get xx articles about CSA and its services published in local print media.</p> <p>Distribute at least xx flyers and/or brochures to low-income ethnic-minority residents.</p>	<p>Staff reports</p> <p>Web links and/or PDFs</p> <p>Staff reports</p>
<p><b>Client Input</b></p>	<p>Distribute client satisfaction and quality of life survey in February to assess our clients' level of satisfaction with SCM services and solicit input regarding recommendations for program improvements. xx% of survey respondents will rate the quality of our case management services as good to excellent.</p> <p>Client grievance procedure distributed and explained to clients on intake.</p>	<p>Completed client satisfaction and quality of life surveys</p> <p>Client signatures of receipt of grievance procedure</p>
<p><b>Client Contribution</b></p>	<p>Distribute a letter to all current and incoming SCM clients requesting contributions to support the program. Although the letter will make it clear that contributions are entirely voluntary and no client will be denied services should they decide not to contribute, we anticipate a xx% increase in donations as a result of our redesigned letter/packet.</p>	<p>Analysis of CSA fundraising database for FY 2010-11 vs. FY 2011-12</p>

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## PROGRAM MANAGEMENT

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**1. Agency Experience:** (a) CSA is the community's safety net, providing critical support services that preserve and promote stability, self-reliance, and dignity. For more than 50 years, we have collaborated with other health and social service agencies to serve low-income families, seniors, and the homeless. We accomplish our mission through four core programs, two of which specifically address older adults:

- **Senior Case Management (SCM)** helps seniors maintain their independence through such services as geriatric case management, volunteer-escorted transportation, and grocery shopping.
- The **Senior Nutrition** program, located at the Mountain View Senior Center, serves hot, nutritionally balanced lunches to more than xx seniors every weekday. The program also includes special events such as music and dancing, presentations on topics of interest to seniors, and opportunities to socialize.
- Our **Emergency Assistance (EA)** program provides one-time assistance with rent and/or utility bills for community members experiencing sudden economic hardship.
- Using the "Housing First" model, our **Alpha Omega Homeless Services** program links homeless individuals and families to services that can shorten their stay in emergency shelters and assist their move into permanent affordable housing.

In addition, our Food and Nutrition Center allows Emergency Assistance and Alpha Omega clients to "shop" for groceries free and to learn healthy eating habits.

(b) The SCM program has operated continuously since 1978. As the area has changed over time, so have our clients' needs and our solutions. Our purpose, however, has remained constant: to help seniors live independently and remain a vital part of the social fabric of their community.

(c) SCM staff works closely with other program staff to meet the needs of local low-income seniors. For example, our Food and Nutrition Center holds targeted drives for foods that are especially important for homebound seniors, such as low-sodium canned goods, fresh fruit and vegetables, and nutritional supplements such as Ensure and Boost. Our Emergency Assistance case managers have assisted senior clients who needed emergency financial aid to move into more affordable housing. And our Senior Nutrition Program Manager provides information about SCM to her program's participants and makes referrals of her patrons to SCM staff.

**2. Facility:** CSA's offices are located at 204 Stierlin Road in Mountain View, one block from a VTA bus stop and two blocks from the Mountain View Transit Center (bus, CalTrain, and light rail). Case managers conduct home visits to homebound seniors. Office hours are Monday to Friday, 9:00 a.m. to 4:00 p.m., but full-time staff are on site from 8:30 a.m. to 5:00 p.m. Senior case management staff "flex" their hours to meet the urgent needs of clients, such as during medical emergencies.

**3. Staff Qualifications:** CSA's Associate Director is responsible for the supervision of the Senior Case Management Program Director, quality assurance, and evaluation of the program's effectiveness. The Associate Director has xx years of supervisory and program management experience in a variety of health and social services agencies. She holds an MS in Social Work and has taught social work at the university level. The Senior Case Management Program Director holds a Baccalaureate degree in Social Work from San Jose State University (with a minor in Gerontology) and has six years of geriatric case management experience. Our two full-time case managers also have Baccalaureate degrees in Social Work from San Jose State University. In addition, we have xx volunteers (with a planned expansion to xx volunteers in FY2011-12) who provide escorted transportation, grocery shopping, and friendly visiting.

**4. Training Plan:** CSA is committed to staff training and provides opportunities for staff to attend off-site workshops such as those offered through the Santa Clara County Aging Services Collaborative, American Society of Aging, El Camino Hospital, and professional associations. In addition, CSA has contracted with consultants to provide in-service trainings on elder abuse, end-of-life-care, managing stress, and dealing with difficult people. We conduct an annual volunteer training that includes pre- and post-training tests on issues affecting the elderly.

**5. Agency Support:** CSA's entire staff and Board of Directors support our efforts to provide a high-quality Senior Case Management program. The agency's Strategic Plan identifies "Expand and enhance case management services" as CSA's #1 priority for 2008-2011. To this end, CSA is committed to securing funding to sustain and expand services. We currently receive SCM funding from the Council On Aging, Social Services Agency, City of Mountain View, Town of Los Altos Hills, the Altos Foundation, the Grove Foundation, Los Altos United Methodist Church Foundation, and the Los Altos Rotary Endowment Fund.

**6. Record Keeping:** CSA maintains a system of financial controls and accounting in conformance with Generally Accepted Accounting Principles (GAPP), and is an active participant in COA's Q System. Case managers enter all client information into Q in real time, which enables SCM staff to produce accurate, up-to-date client demographic and use pattern data. Our database contractor works with COA and CSA staff to ensure the seamless transmission of Q data to COA, including an electronic report once a month. We also retain hard copies of all case records. All client records are retained for seven years. Only CSA case management staff have access to electronic and paper client files.

**7. Minority Provider:** CSA does not fit the COA definition of a minority organization. However, xx% of our staff members are Hispanic, Asian, Pacific Islander, or African-American.