

# Survey of Case Management Services for Older Adults in Dane County January 1, 2019 – August 31, 2019 Synopsis

## **Background**

Through contracts with purchase of service (POS) agencies, Dane County Department of Human Services provides publicly-funded case management services for older adults. Case management services in Dane County are provided through a network of 12 geographically-based senior focal points.

### Primary Goal

The primary goal of case management services is to provide older adults with the support, resources, and community services that they need to safely remain in their own homes and communities. Case managers assist with the assessment of individual needs and the coordination of a variety of services – from home chore and personal care to assistance with health insurance and prescription drug plans.

### Funding

Case management services are funded primarily with General Purpose Revenue (GPR). A small amount of 2019 funding (\$10,000) came from State Health Insurance Assistance Program (SHIP) funds which are Federal dollars from the Centers for Medicare and Medicaid Services (CMS), passed through the State Department of Health Services (WDHS) to counties to provide outreach to low-income older adults for assistance with issues involving Medicare/Medicaid, enrollment in assistance programs to help off-set the cost of Medicare premiums (like LIS – Low Income Subsidy or Extra Help), and any other issue related to Medicare. In Dane County, SHIP funds are used to provide this outreach through five (5) of the senior focal point case management programs.

Dane County Department of Human Services has a long history of investing in and supporting the Senior Focal Point network, which offers a unique opportunity to provide community-based programs and services for older adults living in Dane County. Case management is a vital component of the available service mix. Local municipalities and towns of the 12 Senior Focal Points also make significant investments in this program; during 2019, contributing between 21% and 75% of the program costs for their communities.

### Eligibility

In order to receive County-funded services, clients must be Dane County residents age 60 and older, live in their own home or apartment or home of a family member, and have an income below 240% of the Federal Poverty level.

## **Study**

The purpose of the survey was to measure client satisfaction of case management services with the goal of using this input in order to improve program efficiency and ensure the program is effectively helping older adults.

### Measures

The mail version of the Case Management Survey of the Administration on Aging, Performance Outcome Measures Project (POMP), served as the base instrument. That instrument, developed beginning in 2002, has been used in looking at performance nationally. Using it for this study allowed for comparison with national and regional data available at <http://www.agid.acl.gov/>.

The Case Management Survey examines the services that were provided, recipients' satisfaction with those services, and the ways they have been helpful. Revisions to the Dane County version of the survey were made in 2017 to update the list of services coordinated.

## Translation

The survey was made available in English and Spanish and designed so that the Spanish versions of the form had both the English and Spanish versions side-by-side.

## Survey Population

The survey population was all clients served between January 1, 2019 and August 31, 2019 whose cases were either open or had been closed less than 60 days and who had received case management services. Persons whose cases were closed as they were deceased or had moved out of the service area were excluded. A random sample of this population was pulled.

## Survey Method

A total of 1,498 survey forms were mailed October 18, 2019. Surveys were sent out in DCDHS Department envelopes. A postage-paid, self-addressed return envelope was included.

## Response Rate

The overall response rate for the 422 useable returned surveys was 29.9%; a response rate of 20% is considered acceptable for a one-time mail survey.

Due to the range of response rates and to reflect the overall status of the program, a random sample of 296 surveys was pulled. A sample size of 327 was required for a confidence level of 95% but this was limited to 296 by the lower response rate of NewBridge Madison and Sugar River Senior Center; thus the confidence interval (margin of error) was  $\pm 5.3$  rather than the desired  $\pm 5$ .

## **Findings**

The full report may be found on the County web site at: <https://danecountyhumanservices.org/reports.aspx>. Briefly, some of the findings include:

- Survey respondents indicated their case managers treated them with respect (96%), returned their telephone calls in a timely manner (89%), explained services in a way they could understand (94%), and involved them in discussing and planning their services (87%).
- Slightly less than half (45%) of the respondents indicated their case manager developed a care plan for the services they needed; however, the majority (79%) of those indicated they received a copy of the care plan.
- Persons of Color were significantly less likely than Whites to indicate their case manager treated them with respect, returned their phone calls in a timely manner, and explained services in a way they could understand.
- In examining benefits of case management services, survey respondents indicated their case managers helped them get services they did not have before (78%), their situations were better because of their case managers' help (90%), and the case management services helped them continue to live where they chose (88%).
- Persons of Color were significantly less likely than Whites to indicate that as a result of the case management services their situation is better because of their case manager's help, that the services help the continue to live where they choose, and that they have a better idea of where to get information about other services.
- Overall, 93% of survey respondents were satisfied with the case management services they received.