



# City of Sunnyvale

## Agenda Item-No Attachments (PDF)

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### REPORT TO COUNCIL

#### **SUBJECT**

Consider Change in Service Level for Care Management Program at the Senior Center

#### **BACKGROUND**

Care management programs advocate for and support seniors in their efforts to maintain their independence, age successfully, and age with dignity. The primary role of a care manager is to support seniors' welfare by connecting them and their families to services and resources available from nonprofits and privately funded organizations. A care management program prepares individualized care plans and manages the coordination, procurement and monitoring of services.

From 1999-2003, Sunnyvale Community Services, an independent, nonprofit emergency assistance agency provided care management services to Sunnyvale residents. When the program started in 1999, program costs were \$70,000 for one FTE increasing to \$89,000 in FY 2003/04. After Sunnyvale Community Services eliminated this program in 2003, there was community discussion about how to continue this level of service to Sunnyvale residents.

Council subsequently approved a budget supplement to fund a City-provided program at a service level of 20 hours per week in FY 2006/07. The budget was partially offset by a one-time start-up grant of \$20,000 from Sourcewise (formerly known as the Council on Aging), a 501 (c)(3) non-profit organization which serves as the area agency on aging, and involves networks of state and local organizations to provide integrated care management services to Santa Clara County residents. After the program was established, the City was eligible to apply for available grant funding from Sourcewise on an annual basis.

In FY 2007/08, Council incorporated a permanent allocation into the operating budget which, through use of contracting non-benefitted staff and grant funding from Sourcewise, continued the program at 20 hours per week. The FY 2014/15 Adopted Budget includes \$46,714 for this activity.

In FY 2012/13, Council approved a special project in the amount of \$40,000 funded for one year from the Council Service Level Set Aside in the General Fund to supplement the existing operating dollars and to increase the care management program service level to 40 hours a week. The increase resulted in Sunnyvale's program being eligible for increased grant funds from Sourcewise, with Sourcewise awarding \$18,000. This special project funding was continued for FY 2013/14 and FY 2014/15, maintaining a service level of 40 hours/week care management services, or one care manager for every 21,771 Sunnyvale residents aged 60+. In approving the funding for FY 2014/15, Council asked staff to return with a report identifying both the need for care management services along with a proposal for permanent staffing of the program.

#### **EXISTING POLICY**

## **General Plan, Community Conditions**

**Policy CC-10.5** - Develop and implement programs in order to meet the developmental needs and social needs of specific targeted populations (e.g. youth, teens, seniors, disabled).

**Policy CC-10.6** - Leverage available resources by pursuing co-funded and/or cooperative agreements for provision and maintenance of programs, facilities and services, in order to maximize benefits to the community.

## **Council Policy, Socio-Economic**

**Policy 5.1H.3** - Encourage the provision of services for older adults in Sunnyvale.

**Policy 5.1.H.10** - Encourage the adequate provision of health care to Sunnyvale residents.

**Policy 5.1.H.11** - Encourage the adequate provision of social services to Sunnyvale residents.

## **Council Policy, Planning and Management**

**Policy A.1.13** - All competing requests for City resources should be weighed within the formal annual budget process.

## **ENVIRONMENTAL REVIEW**

This activity does not require environmental review because it is not a project that has the potential to cause a significant effect on the environment. (CEQA Guideline 15061(b)(3).)

## **DISCUSSION**

### **Overview of Sunnyvale's Care Management Program**

Sunnyvale's care management service level is currently 40 hours a week, equivalent to 1.0 FTE or 1 care manager for every 21,771 Sunnyvale residents age 60+. Two part-time casual employees, each work 900 hours a year responding to the following needs:

1. Providing emergency referrals to families, hospitals, and the Department of Public Safety for the welfare and safety of frail, ill and vulnerable seniors living in Sunnyvale;
2. Providing direct assistance to seniors with issues related to living conditions and housing, including eviction, homelessness and safety (falls prevention/home safety). Services provided include helping seniors search for affordable housing; negotiating lease extensions with landlords while attempting to find new home placements; and finding resources for rent and moving expenses;
3. Advocating for seniors with limited or no family support to help them secure resources/services from local service agencies;
4. Providing assistance in reporting abuse and coordinating response with Santa Clara County Adult Protective Services.
5. Information and referral services to an average of 45 non-clients per month (where no case files are established) in addition to their client load.

For situations requiring more than information and referral services, care managers open a formal case file for the individual, allowing the care managers to provide comprehensive support including assessments, care planning and client monitoring.

The following tables detail statistics for Sunnyvale's Care Management program during the last full year of service.

### **Statistics for FY 2013/14 Case Load**

Service Level	Case Load/ Clients	Hours Specific to Case Load	Home Visits	Contacts with Community (clients, non-clients, and agency partners)
40 hours/week	92	1,021	189	2,427

Age Group	Clients Served	Percentage of Case Load
60-69	11	12%
70-79	20	22%
80-89	39	42%
90 or above	22	24%
Total	92	100%

Clients living alone: 43 (47%)

### Benchmarking

Sourcewise provides care management services to Santa Clara County residents at a ratio of one care manager for every 23,340 adults aged 60+ (Attachment 1 - Comparison of Neighboring Cities Care Management Services) with limited services to those receiving Medi-Cal insurance. While Santa Clara County offers related services to seniors such as crisis intervention (i.e., Adult Protective Services) or funding of in-home support services, the County relies on Sourcewise to provide comprehensive care management services. With the increasing numbers of seniors needing safety net services within the county due to a demographic transition, Sourcewise collaborates with other agencies, including cities to expand their network and reach. Sourcewise has awarded the City of Sunnyvale a grant in support of Care Management services since FY 2006/07.

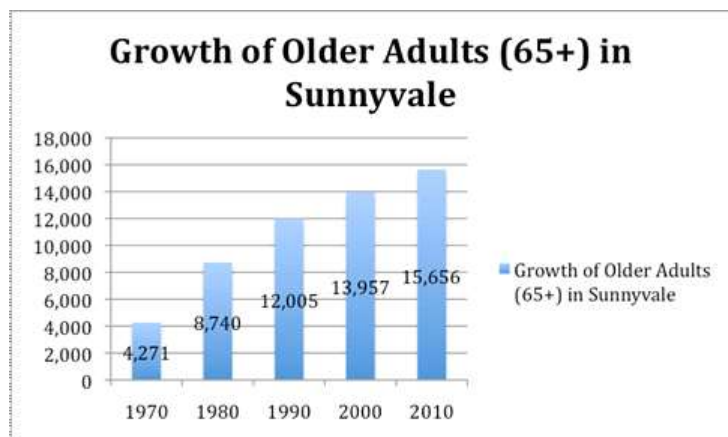
Local agencies including the cities of Cupertino, Milpitas and Santa Clara directly provide care management services while Campbell, Los Altos, Mountain View, and Palo Alto fund outside agencies such as Avenidas, Community Services Agency-Mountain View, and Outreach to provide the service. Both service delivery models successfully provide needed services to their respective communities.

A survey of local cities that directly provide care management programs shows the average service level provided to their residents, in addition to the services available through Sourcewise, is 1:12,774 (care manager: residents age 60+). Sunnyvale's service level is at 1:21,771 and provides only about half the direct service level of these other cities. (Attachment 1 - Comparison of Neighboring Cities Care Management Services)

### Need for Care Management Services

Similar to a number of communities nationwide, Sunnyvale's population is aging. The median age in the City in 1990 was 32.3, and by 2010 it was 35.6. In 2010, 15.6% of Sunnyvale's total population was comprised of seniors age 60 and older (up from 14.3% in 2000, an increase of 2,967 people). Santa Clara County projects an even higher percentage of residents will be over age 60 in the next 10 years as compared to either California or the United States averages (Santa Clara County Seniors' Agenda: A Quality of Life Assessment - 2012). Older adults are living longer than previous

generations and the demand for services for this aging demographic will continue to grow.



Source: US Census

Determining who may need Care Management services is dependent upon a variety of factors. In FY 2013/14, City of Sunnyvale Care Management program total case load was 92. According to standards established by Sourcewise, the recommended case load for a 40 hour a week Care Management program is 60 per year. Based on that standard, the City of Sunnyvale Care Management program served 32 or 53% above the recommended level. Not all cases receive the full scope of possible services because Sunnyvale's Care Managers devote attention to the most pressing needs. This results in less than ideal time available to implement, manage and monitor cases.

The following lists the primary reasons care manager services were sought in Sunnyvale. Attachment 2 provides supporting data and statistics about the prevalence of these factors.

- Health issues related to aging (including isolation that could lead to depression; mental health issues including dementia and hoarding; and rehabilitation / recovery from falls)
- Affordable Housing (support in finding housing)
- Elder Fraud/Abuse (victims of financial fraud / scams or physical / emotional abuse and neglect)
- Individual Finances (poverty or lack of financial resources to take care of basic needs including paying for rent, utilities and food).

In these instances, seniors had no or limited support system of family and friends. They needed Care Managers to advocate for services, connect them with resources and develop strategies to help maintain their independence and be part of the community.

In summary, there is a continued need for Care Management services in Sunnyvale based on:

- An aging population: 15.5% (21,771) of Sunnyvale Residents are 60 years and older and are at risk to experience the factors listed above;
- Consistent demand for services: Since the increase in service level from 20 to 40 hours per week the last two years, the City of Sunnyvale Care Management program has consistently served 53% more than the recommended case load expected of a 40 hour/week program, with only limited outreach;
- Neighboring cities provided care management services at an average service level of one care manager to 12,774 adults aged 60+. (Attachment 1 - Comparison of Neighboring Cities Care Management Services)

### Options for Permanent Staffing of Programs

**Option 1:** Increase service level to be commensurate with average of neighboring cities.

- To achieve this level, the City would need a 70% increase to current service levels from 1.0 FTE (1800 hours annually / 40 hours per week) to 1.7 FTE (or 3,060 hours annually / 68 hours per week).

**Option 2:** Make the current service level of 40 hours per week permanent with an average service level of 1:21,771 residents aged 60+.

- Fund the care management program entirely within the Arts and Recreation Program operating budget at current net service level of 40 hours a week (see FY 2014/15 funding level below).

### FY 2014/15 Funding

Arts and Recreation Program Direct Expenditures (Care Management Allocation)	\$46,714
Special Project Funding From Council	\$40,000
Sourcewise Grant supplementing Project 829640* (not guaranteed source of funding)	\$18,000
<b>Total Funding:</b>	<b>\$104,714</b>

\*Per Council direction, funding will provide additional 13 hours/week to augment services.

### FISCAL IMPACT

Service Delivery Options*	Total Annual Cost	FY 2015/16 Budget	Additional Funding Required
<b>Option 1: Increase Service Level</b> (to 68 hours/week)	\$120,087	\$47,061	\$73,026
<b>Option 2: Maintain Current Service Level</b> (of 40 hours/week)	\$87,061	\$47,061	\$40,000

\*Note: These options are based on the continued use of casual staffing. While benefitted staff could also be used, costs

would be substantially higher.

The twenty-year additional cost of Option 1 to the General Fund Long Term Financial Plan is approximately \$2 million. The twenty-year additional cost of Option 2 is approximately \$935,000.

### **Anticipated Sourcewise Grant Funds**

Sunnyvale's Care Management Program has received grant funds from Sourcewise for several years. Continuation of this funding is not guaranteed. However, when available, it is directly tied to the level of service provided by the receiving agency, with larger grants available for larger programs. Providing a service level of at least 40 hours/week of care management service makes the program eligible for the largest available grant. With Sourcewise funding in FY 2014/15, Council has directed staff to use those funds to augment the budgeted service level (RTC 14-1085). This funding is providing an additional 13 hours/week to the budgeted service level. In previous years, grant funds were used to offset the City's costs.

### **PUBLIC CONTACT**

Public contact was made by posting the Council agenda on the City's official-notice bulletin board outside City Hall, at the Sunnyvale Senior Center, Community Center and Department of Public Safety; and by making the agenda and report available at the Sunnyvale Public Library, the Office of the City Clerk and on the City's website.

### **ALTERNATIVES**

1. Consistent with Council Policy, Planning and Management Policy A.1.13- "All competing requests for City resources should be weighed within the formal budget process", defer any permanent funding decisions on the Care Management Program until the formal budget process occurs for the next two year budget cycle - FY 2016/18.
2. Allocate \$40,000 from the Council Service Level Set Aside in the General Fund for FY 2015/16 to continue current Care Management Program service level of 40 hours per week.
3. Allocate \$40,000 from the Council Service Level Set Aside in the General Fund for FY 2015/16 and the following 20 years to permanently continue current Care Management Program at a service level of 40 hours per week.
4. Allocate \$73,026 from the Council Service Level Set Aside in the General Fund for FY 2015/16 and the following 20 years to permanently continue Care Management Program at a service level of 68 hours per week.
5. Other action as determined by Council.

### **STAFF RECOMMENDATION**

Alternatives 1 and 2: Consistent with Council Policy, Planning and Management Policy A.1.13 - "All competing requests for City resources should be weighed within the formal budget process", defer any permanent funding decisions on the Care Management Program until the formal budget process occurs for the next two year budget cycle - FY 2016/18, and 2) Allocate \$40,000 from the Council Service Level Set Aside in the General Fund for FY 2015/16 to continue current Care Management Program service level of 40 hours per week.

Given the steadily increasing numbers of older adults in Sunnyvale, the demand for care

management services will continue to grow. Staff recommends maintaining services at the current level of 40-hours week for one more year until such time that Council can weigh the request for permanent funding in the context of the next two-year budget cycle. While Sunnyvale's service level would be below that of its neighboring cities, it would maintain services at the same level that Council has funded through a special project for the past three years.

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### **ATTACHMENTS**

1. Comparison of Neighboring Cities Care Management Services
2. Risk Factors for Those Requiring Care Management Services