

MEMORANDUM

August 3, 2007

TO: Angela Calvillo, Clerk of the San Francisco Board of Supervisors

THROUGH: Department of Aging and Adult Services Commission

FROM: Anne Hinton, Executive Director
Linda Edelstein, CLF Program Manager

SUBJECT: **Community Living Fund (CLF): Program for Case Management, and Purchase of Resources and Services.**

6-month Report, January through June, 2007

Section 10.100-12 of the San Francisco Administrative Code created the Community Living Fund (CLF) to fund aging in place and community placement alternatives for individuals who may otherwise require care within an institution. The Administrative Code requires that the Department of Aging and Adult Services (DAAS) report to the Board of Supervisors the level of service provided and costs incurred in connection with the duties and services associated with this fund. The report is to be provided every six months.

The CLF provides for home and community-based services, or a combination of equipment and services, that will help individuals who are currently, or at risk of being, institutionalized to continue living independently in their homes, or to return to community living. This program, using a two-pronged approach of coordinated case management and purchased services, provides the needed resources, not available through any other mechanism, to vulnerable older adults and younger adults with disabilities.

This report documents the activities of the Department of Aging and Adult Services in the continuing implementation of the Community Living Fund.

New Activities

DAAS developed an interim access procedure to allow services to begin as early as possible.

While the RFP was still in process, DAAS developed and implemented an interim CLF access procedure. The department augmented the budgets of two community-based service providers, IOA (Institute on Aging) and Curry Senior Center, to enable them to purchase goods and services for eligible individuals who required minimal case management assistance and support for community living. Beginning March 1, 2007, the procedure allowed for program access through the early start-up phase.

Community Living Fund (CLF) Program contract was awarded in April 2007.

Through an RFP process, the IOA was selected as the primary contractor. The IOA and its sub-contractors are collaborating to provide the services funded through the CLF. The sub-contractors include:

- Catholic Charities CYO
- Conard House
- Curry Senior Center
- In Home Support Services (IHSS) Consortium
- Lighthouse for the Blind and Visually Impaired
- Progress Foundation
- SF Department of Public Health (DPH), Health at Home program

These agencies bring staff knowledge in specialty areas and cultural competencies to the service provision of the CLF, including money management, home care, mental health, disability needs and intensive care management in community settings throughout the City and County of San Francisco.

The Institute on Aging and its sub-contractors are ramping up for full implementation.

During the start-up phase of programming (April to June 2007), the IOA built on existing infrastructure. This enabled the CLF program to start partial service provision in April 2007 after some initial staff were hired and trained. The IOA already had the fiscal and database staff in place to provide the support necessary for tracking purchased services. Program data is currently being collected via an Access and Excel-based database system while the IOA completes a CLF-specific enhancement to its existing care management database software. The finished database will provide the ability to track client information, assessments, care plans, progress notes, service authorizations and purchased services. Existing data will be migrated into the finished database at its completion. Data collected by the IOA will be easily accessible to DAAS for coordination with the CLF data collected at the DAAS LTC Intake and Screening Unit, allowing an integrated data analysis.

DAAS implemented a Long-Term-Care (LTC) Integrated Intake and Screening Unit

The DAAS/CLF program has developed and instituted a referral and eligibility screening process, administered by the DAAS LTC Intake and Screening Unit. All referrals to the CLF program come through this Unit. DAAS staff is also in the process of developing a dedicated referral database, allowing the department to capture client data from the first point of entry into the system. Data from the LTC Intake and Screening Unit will be integrated with the data collected at the IOA.

Community coordination of services efforts continues.

CLF program staff has coordinated ongoing meetings with Janet Gillen, Laguna Honda Hospital (LHH) Director of Social Work; Liz Gray, Director of Long Term Care Services

over the LHH Targeted Case Management Program; Sharon Kwong, Director of Social Work at San Francisco General Hospital (SFGH); and Kelly Hiramoto, Director of the CLF program at the IOA. This group is in the process of developing protocols and procedures to address the designated top-priority populations for the CLF. These populations include those at LHH and SFGH willing and able to be discharged into the community as well as those on the LHH waiting list.

CLF staff has also been working to develop collaborative protocols with San Francisco Senior Center, their Homecoming Services Program and their new Transitional Care initiative. These programs provide services needed by frail seniors who are being discharged from acute hospital care and require a quick turn around for provision of services.

DAAS conducted significant outreach.

DAAS CLF staff initiated work on the outreach plan outlined in the previous 6-month report. The majority of the planned visits to orient program providers and staff to the CLF and its available funds have been completed. These outreach visits include:

- Adult Day Health Care programs
- Neighborhood Senior Centers
- DAAS programs
- DPH programs
- Homeless and housing groups;
- Non-profit Housing groups;
- Community networks including:
 - DAAS Bethany Center Trainings for the community;
 - Disability advocacy and direct service groups such as:
 - Social Workers and Discharge Planners from city hospitals
 - On Lok – Program for All-inclusive Care for the Elderly
 - Home delivered meal programs
 - Neighborhood Resource Centers for Seniors and Adults with Disabilities,
 - Family Service Agency

Program Challenges

- *Staffing issues:* With respect to staffing, the IOA and its partner agencies have been recruiting, hiring and training for the CLF-specific staff positions. Full implementation had been expected by July 1, 2007; however, some difficulty in finding the appropriate clinical staff has caused a one or two month delay. The DAAS LTC Intake and Screening Unit also struggled with finding the appropriate workers to focus on CLF referrals. By June 30, staffing was adequate to cover the workload, although the Unit continues to recruit.
- *Data collection:* The databases at both the IOA (Contractor) and at DAAS are in mid-to-late development. Until this software is complete, both the IOA and DAAS are using Excel spreadsheets for basic data collection and tracking.

Summary of Services¹

Referral Intake and Screening

The Intake and Screening Unit began receiving referrals for the CLF program on February 28, 2007, and received 161 referrals by the end of June. The vast majority of those referrals (157) met initial eligibility requirements. Those individuals were referred on to the IOA for a more detailed assessment and eligibility verification. As of July 2nd, the status of those 157 cases was as follows:

- 92 had been approved to receive service,
- 44 were denied service (often due to the availability of alternative resources that made the use of CLF funds unnecessary),
- 21 were pending final assessment.

Service Requests

The most common requests for services were in the following service areas:

- In-home support services (54 requests),
- Assistive devices (51 requests),
- Housing-related services (32 requests).

These service area concentrations may shift during the next six months, however, as the program transitions from an interim access protocol, which focused on one-time purchases without case management, to the full program design with additional case management capacity.

Purchased Services

As of the end of June, the CLF program had completed service purchases for 25 unduplicated clients.

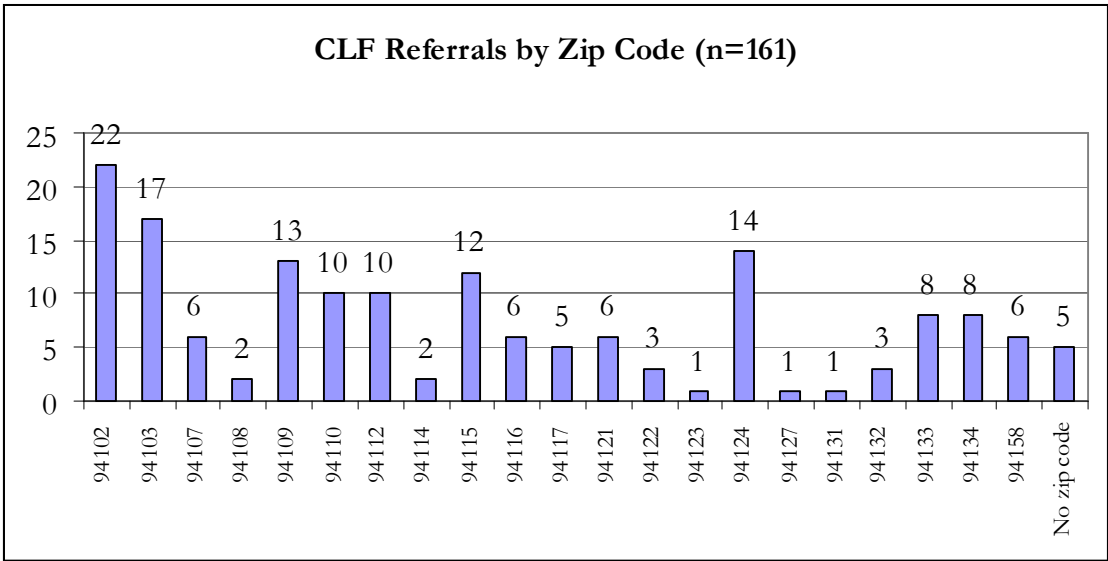
Referral Sources

Referrals came from 47 local organizations, demonstrating the impact of recent outreach efforts. The largest numbers of referrals have come from the In-Home Supportive Services (IHSS) program and from the IOA's Multipurpose Senior Services Program (MSSP).

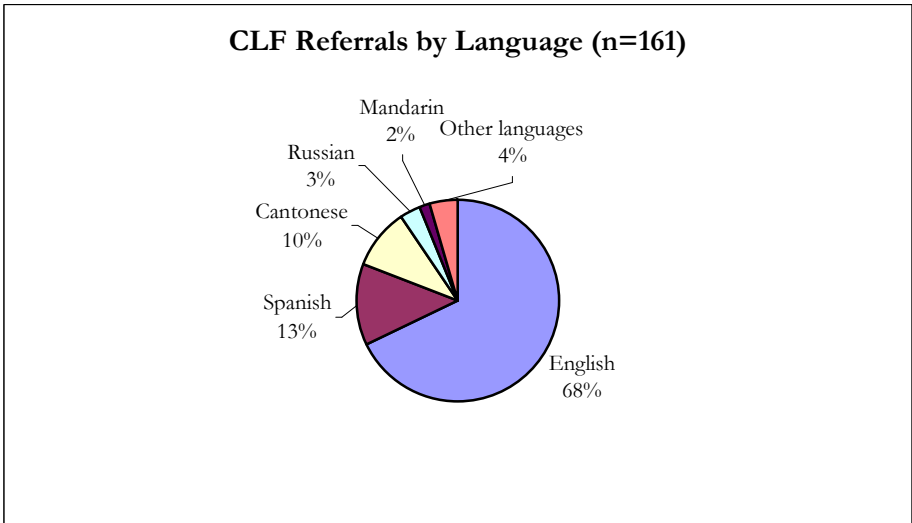
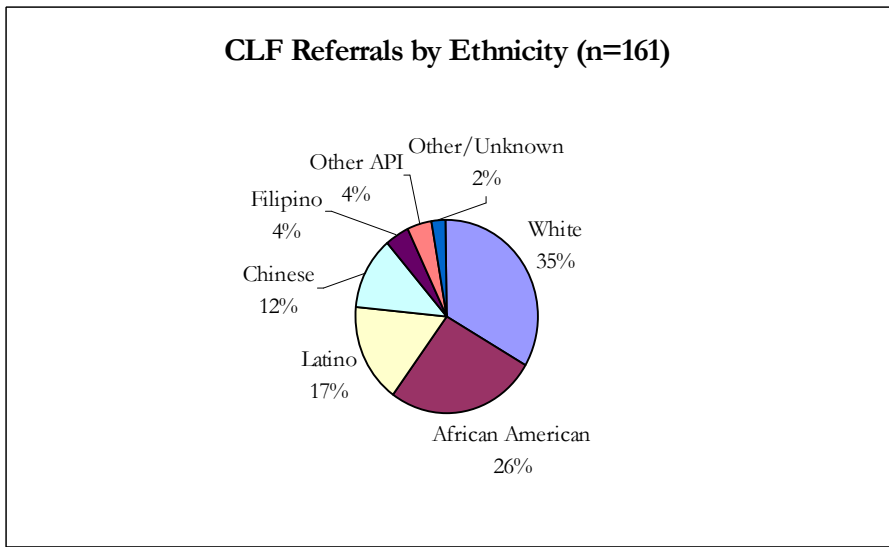
Referral Demographics

While the majority of referrals to date have been over 60 years of age, nearly one-third were younger adults with disabilities (32%). Individuals have been referred from all over the city, with the largest numbers from the Tenderloin (94102), South of Market (94103), the Bayview/Hunter's Point (94124), and the northeast neighborhoods near Chinatown (94109). See chart below for detail.

¹ Please see Appendix A for more detailed information regarding client demographics, living situations, and referral sources to date.



Referred clients represent the diversity of these neighborhoods, both in terms of ethnicity and language. Approximately one-third of clients referred to the program speak a language other than English.



Appendix A: Community Living Fund Referral Data

February 28, 2007 – June 30, 2007

Eligibility After Initial Screening	Number	Percent
Eligible	142	88%
Eligible w/case conference	15	9%
Ineligible	4	2%
Total	161	100%

Screened as Eligible - Accepted by IOA*	Number	Percent
Yes	92	59%
No*	44	28%
Pending	21	13%
Total	157	100%

*Data as of 7/2/07. 28 out of 44 of the denials were due to the availability of other resources.

Age	Number	Percent
18-59	51	32%
60+	110	68%
Total	161	100%

Ethnicity	Number	Percent
White	54	34%
African American	42	26%
Latino	27	17%
Chinese	20	12%
Filipino	7	4%
Japanese	2	1%
Native American	2	1%
Samoan	2	1%
Other/Unknown	2	1%
Vietnamese	1	1%
Korean	1	1%
South Asian	1	1%
Total	161	100%

Appendix A: Community Living Fund Referral Data

February 28, 2007 – June 30, 2007

Language	Number	Percent
English	109	68%
Spanish	21	13%
Cantonese	16	10%
Russian	5	3%
Mandarin	3	2%
Arabic	2	1%
Tagalog	2	1%
Korean	1	1%
Toisan	1	1%
Vietnamese	1	1%
Total	161	100%

Zipcode	Number	Percent
94102 - Hayes Valley/Tenderloin	22	14%
94103 - South of Market	17	11%
94107 - Potrero Hill	6	4%
94108 - Chinatown	2	1%
94109 - Russian Hill/Nob Hill	13	8%
94110 - Inner Mission/Bernal Hts	10	6%
94112 - Outer Mission/Excelsior/Ingleside	10	6%
94114 - Castro/Noe Valley	2	1%
94115 - Western Addition	12	7%
94116 - Parkside/Forest Hill	6	4%
94117 - Haight/Western Addition/Fillmore	5	3%
94121 - Outer Richmond/Sea Cliff	6	4%
94122 - Sunset	3	2%
94123 - Marina/Cow Hollow	1	1%
94124 - Bayview/Hunters Point	14	9%
94127 - West Portal/St. Francis Wood	1	1%
94131 - Twin Peaks/Diamond Hts/Glen Park	1	1%
94132 - Stonestown/Lake Merced	3	2%
94133 - North Beach/Telegraph Hill	8	5%
94134 - Visitacion Valley	8	5%
94158 - China Basin	6	4%
No zip code	5	3%
Total	161	100%

No referrals to date from the following zip codes: 94104, 94105, 94111, 94118, 94128, 94129, 94130.

Appendix A: Community Living Fund Referral Data

February 28, 2007 – June 30, 2007

Referring Agency	Number	Percent
ALS	1	1%
APS	2	1%
Bernal Heights Neigh. Center	1	1%
BVHP/ADH	5	3%
CATS	1	1%
Central City Older Adults	5	3%
Chinatown CDC	1	1%
CPMC	1	1%
Curry Center	2	1%
DPH Forensic AIDS Project	1	1%
DPH/PHN	1	1%
Family Service Agency	4	2%
Golden Gate ADHC	3	2%
Health at Home	2	1%
Idylwood Care Center SNF	1	1%
IHSS	20	12%
IHSS Consortium	14	9%
IOA/Linkages	13	8%
IOA/MSSP	17	11%
Jewish Family and Children's Services	1	1%
Kaiser Home Health	3	2%
LHH	6	4%
Lighthouse for the Blind	3	2%
Mabini Adult Day Health	9	6%
Mayors' office	1	1%
Mercy Housing	1	1%
Mission Creek ADHC	8	5%
MultiService Center South	1	1%
Ombudsman	1	1%
Presentation ADH	1	1%
Public conservator	2	1%
Public Guardian	2	1%
Relative	2	1%
Self Help ADHC	3	2%
Self Help for the Elderly	1	1%
Self Referral	3	2%
SF Sen Ctr	2	1%
SF Sen Ctr/Homecoming	1	1%
SFGH	3	2%
St Anthony's	2	1%
St. Mary's Hospital	1	1%
Sutter VNH	1	1%
Swords to Plowshares	1	1%
TCM	1	1%

(continued on next page)

Appendix A: Community Living Fund Referral Data

February 28, 2007 – June 30, 2007

Referring Agency (continued)	Number	Percent
Tenderloin Mental Health	1	1%
TLC	1	1%
VAMC	2	1%
Victorian Manor	1	1%
UCSF	1	1%
Total	161	100%

Residence Type	Number	Percent
B+C/Assist Living	4	2%
Homeless	1	1%
Laguna Honda	4	2%
Other SNF (long term)	1	1%
Owned house	12	7%
Rented apt/house	123	76%
SRO	15	9%
Other	1	1%
Total	161	100%

Service Request Area	Number
In Home Support	54
Assistive Devices	51
Housing Related	32
Day Programs	24
Case Management	20
Money Management	20
Mental Health or Substance Abuse	15
Home Repair/Modification	14
Furniture/Appliances	14
Caregiver Support	13
Medical/Dental Items & Services	13
Food	10
Emergency Response/Lifeline	6
Other	14

Appendix A: Community Living Fund Referral Data

February 28, 2007 – June 30, 2007

Expenditure Report – Fiscal Year 2006/07

An expenditure report is included below which details the total amount spent for the CLF during its first year of operation, ending 6/30/07. The staffing component includes salaries and benefits for two part-time Civil Service staff whose costs will only be included in the ramp-up phase of the project. The CLF has four positions dedicated in 2007/08: one 1824 Principal Administrative Analyst, one 1822 Administrative Analyst, and two 2940 Protective Services Workers. Hiring for these positions is in process. The contract total provided includes the Institute on Aging as well as all of the programs' subcontractors. As noted earlier in the report, all purchased services are coordinated through the IOA. The expenditures have been categorized into the following: case management, purchased services, capital and equipment, and operating and administration. The program has also invested in the provision of an IT software developer, who is working on a database designed specifically for the CLF.

Community Living Fund - Expenditures as of June 30, 2007

<i>Institute on Aging</i>	<i>Case Management</i>	\$120,770
<i>includes all sub-contractors</i>	<i>Purchased Services</i>	\$21,050
	<i>Capital and Equipment</i>	\$46,200
	<i>Operating and Admin</i>	\$86,795

Contract Total **\$274,815**

DAAS Program Staff
Salary & Fringe Benefits **\$204,022**

IT Software Development **\$34,000**

Grand Total	\$512,837
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