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## MEMORANDUM

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DATE: October 25, 2012

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

THROUGH: Aging and Adult Services Commission

FROM: E. Anne Hinton, Executive Director, Dept. of Aging and Adult Services  
Linda Edelstein, Long Term Care Operations Director

SUBJECT: Community Living Fund (CLF): Program for Case Management and  
Purchase of Resources and Services. Six Month Report:  
January - June, 2012

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### OVERVIEW

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

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.

The CLF Six-Month Report provides an overview of trends. The attached data tables and charts show key program trends for each six month period beginning in 2007, along with project-to-date figures where appropriate.

### KEY FINDINGS

#### Referrals & Service Levels

- ❖ The CLF received 136 total new referrals, of which most (76%) were eligible. 405 clients received service (up significantly compared to 301 served during the previous six-month period).
- ❖ Enrollments in the core services provided by the Institute on Aging (IOA) peaked at 369 during July – December 2009 and are now at 276. The overall decline reflects the exhaustion of funding surpluses from prior years and the subsequent alignment of enrollments to the capacity of the IOA's baseline budget of \$2,830,886.

- ❖ Sixty-eight percent of program enrollments in the last six months were in the IOA's CLF program, 44% of which received service purchases. The remaining were in San Francisco Senior Center's (SFSC) Homecoming transitional care and Meals on Wheels (MOW) emergency home-delivered meal programs.

## Demographics

Trends in CLF referrals are shifting over time:

- ❖ Referrals from younger adults remain at an increased level (51%), up from the last reporting period (47%);
- ❖ Referrals from Whites are steady at 25%, while referrals from African Americans returned to historical levels at 16%; Chinese referrals remained low compared to citywide demographics; Referrals not reporting ethnicity data are on the rise, and program staff are working to address this data collection issue.
- ❖ Referrals from English-speaking clients continue to dominate (83%); and
- ❖ Referrals from 94116, home to Laguna Honda Hospital, have increased over the life of the program (currently 21%), while referrals from the South of Market (94103) and the Inner Mission/Bernal Heights (94110) have declined over the life of the program;
- ❖ Referrals from Laguna Honda Hospital and Targeted Case Management remain steady over the last two years at 30% of all referrals, significantly up overall from FY 2007/2008 (10%).

## Service Requests

- ❖ Case management, in-home support, and housing-related services remain the most commonly-requested services at intake, which mirrors service purchase trends for enrolled clientele.

## Program Costs

- ❖ Total program expenditures peaked during January – June 2010 at \$2.8 million, exhausting prior year carry-forward funding. Expenditures in the second half of FY 11-12 are down to \$1.6M, making the program under budget for the fiscal year.
- ❖ CLF Purchase of Service costs have decreased to approximately half the level they were during peak spending in January – June 2010 as the budget has returned to base level. With this year yielding a surplus, plans are in place to expand services slightly in FY 2012/2013. Home care and board and care costs remain the largest categories for purchased services.
- ❖ Costs per client are as follows:
  - Total monthly program costs per client<sup>1</sup> averaged \$670 per month in the latest six-month period. This figure has shown a fairly steady downward trend since the high of \$1,067 in January – June 2009. Declining average costs have been due, in part, to the program's increased capacity to

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<sup>1</sup> This calculation = [Grand Total of CLF expenditures (from Section 3-1)]/[All Active Cases (from Section 1-1)]/6.

leverage outside funding such as the NF/AH waiver and the CCT Money Follows the Person Project.

- Average monthly purchase of service costs for CLF clients who received any purchased services has settled at approximately \$1,100 - 1,200 per month.
- Excluding costs for home care and rental subsidies, average monthly purchase of service costs for CLF clients who received any purchased services was \$115 per month in the latest reporting period, compared to \$144 per month in the previous six-month period. This is largely due to increases in adult day programs, board and care, non-medical home equipment, and assistive devices.

### **Performance Measures**

- ❖ The program performance measures showed 77% and 83% of formerly institutionalized and imminent risk clients continuing community living for a period of at least six months, respectively. The performance measures target was raised in FY 2011/2012 from 75% to 80%.

### **Systemic changes / trends affecting CLF**

#### **❖ Conversion of Medi-Cal ADHC benefit to CBAS.**

CLF continues to be actively involved in the process of converting Medi-Cal ADHC to CBAS. Starting in April 2012, CLF began purchasing ADHC services for 81 clients awaiting state fair hearings to determine their CBAS eligibility. Those hearings have been continuously delayed and most have still yet to take place. In the months of April – June 2012, CLF purchased \$188,758 of ADHC services to ensure no gaps in service for these clients – many of whom are anticipated to be determined eligible for CBAS.

#### **❖ Increasing Number of DCIP clients Living in the Community.**

As the number of DCIP clients living in the community continues to grow, so does the need for intermittent intensive care management from CLF. With maintaining DCIP clients in the community still a priority objective for CLF, the result is a diminished capacity to serve non-DCIP clients already living in the community. In the first quarter of FY12-13, CLF will add two case manager positions to increase the capacity to serve non-DCIP clients. One of these positions will require Chinese speaking skills to continue outreach efforts to this underrepresented population.

#### **❖ Addressing Mental Health Needs of CLF Consumers.**

CLF noted an increase in clients who had mental health issues that affected their ability to live independently. CLF has added a part-time psychologist to its staffing structure, with the following goals:

- Increase the percentage of CLF clients willing to engage in mental health services;

- Decrease the percentage of CLF clients with active mental health diagnoses but no corresponding mental health service plan goals;
- Improve Care Manager’s recognition of how mental and behavioral health issues can affect a client’s willingness to engage and follow through with their community living plan; and
- Provide skill building and case consultation to Care Managers, more particularly, educating care managers on strategies to engage clients in mental health services through DPH CBHS for those who meet outpatient criteria, and working with clients with difficult behaviors, personality disorders, etc. that promotes wellness.

In order to assess the need and determine progress, audits of the mental health components of active CLF client records were conducted in December 2011 and again six months later. The results indicate significant progress and the need for ongoing support.

- 74% of CLF clients with mental health issues at a level where treatment is indicated engaged in formal treatment of at least 3 sessions (increased from 46% in Dec 2011)
- 64% of CLF clients with mental health issues have these issues actively addressed in service plans (increased from 42% in Dec 2011)
- Note: During the review, only 2% of CLF clients with identified mental health issues should have had their service plans updated to include Mental Health (decreased from 20% in Dec 2011.) The remaining clients either refused to add mental health to the service plan, were already connected to stable mental health services, were unable to utilize services due to dementia or other condition, or mental health issues were considered minor and not impacting client’s care plan.
- Every CM participates in care conferences 2x/month (facilitated by the psychologist) that includes an in-depth case review, follow-up on progress from previous case recommendations, and skill building training.
- CMs have administered 120 brief behavioral health gating screens in an effort to increase willingness to engage with more intensive assessments and brief treatment by the IOA Psych Department.

The CLF Psychologist will act as a liaison between CBHS and CLF as well as provide oversight of the mental health components of CLF client care plans.

<b>Client’s Situation</b>	<b>CLF Psychologist Role</b>
Meets CBHS outpatient criteria, engaging with services at CBHS clinic	Consult as needed with CLF CM and/or CBHS clinic.
Meets CBHS outpatient criteria, not engaging with services at CBHS clinic	Consult with CLF CM re: encouraging engagement at CBHS clinic and/or assess willingness to engage with home-based therapy services. Assess need for ongoing Mental Health ICM in conjunction with

	CLF and/or after CLF discharge.
Does not meet CBHS outpatient criteria, active mental/behavioral health issues identified that are affecting client's community living plan. (e.g. willingness to attend day program, cooperate with homecare workers etc.)	Consult with CLF CM re: behavioral interventions, assess appropriateness and/or willingness to engage in brief home-based therapy services.
Unclear if client meets CBHS outpatient criteria, physical limitations make accessing outpatient services difficult, active mental health issues identified	Consult with CLF CM as needed, assess appropriateness and/or willingness to engage in home-based therapy services.

❖ **Providers report high levels of satisfaction with IOA's CLF services.** In July 2012, CLF sent out an electronic provider satisfaction survey to 185 providers who CLF staff had worked with in the past (and had an email address for). The list of providers included hospital and SNF discharge planners, housing coordinators, primary care physicians, other community-based social workers, board and care staff, and others. Respondents were asked to rate how much they agreed with the statements below using:

1 = Strongly Disagree, 2 = Somewhat Disagree, 3= Somewhat Agree, 4 = Strongly Agree

	<b>Average Rating</b>
CLF staff follow through on agreed upon plans	3.6
CLF staff are strong advocates for their clients	3.6
CLF staff develop trust and rapport with their clients	3.5
CLF staff are knowledgeable about community based resources	3.5
CLF staff are able to quickly and clearly present a client's situation and the presenting problems in a case conference setting	3.5
CLF staff are creative problem solvers	3.4
CLF staff are quick to respond to my phone calls or emails	3.4

A detailed summary of the findings from that survey is included as an Appendix to this report.

## Appendix A CLF Provider Satisfaction Survey Results

*In July 2012, CLF sent out an electronic provider satisfaction survey to 185 providers who CLF staff had worked with in the past (and had an email address for). The list of providers included hospital and SNF discharge planners, housing coordinators, primary care physicians, other community-based social workers, board and care staff, and others. Two-thirds (2/3) of the respondents indicated that they have worked with a CLF Care Manager (CM) more than 10 times and were currently working with a CLF CM so the data is primarily from individuals who know CLF well. The survey elicited 33 responses (18%) in total and the results were generally very positive. A summary of the results is presented below:*

Respondents were asked to rate how much they agreed with the statements below using

1 = Strongly Disagree, 2 = Somewhat Disagree, 3= Somewhat Agree, 4 = Strongly Agree

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CLF staff are able to quickly and clearly present a client's situation and the presenting problems in a case conference setting	3.5
CLF staff are creative problem solvers	3.4
CLF staff are quick to respond to my phone calls or emails	3.4

*Respondents were also asked to give feedback about individual staff who have gone above and beyond or have not met expectations for some reasons. Those responses are recorded below – they have been made anonymous for the purposes of this summary but have been shared with individual Care Managers and their clinical supervisors for follow-up and recognition.*

**“CLF CM is doing the best job with two of the most challenging clients I have ever encountered.”**

“CLF CM is great on close follow through. CLF CM has an extremely challenging client who requires endless assistance and CLF CM never flags.”

“CLF CM always does a great job of case presentation and care planning, with some of the more difficult clients we have worked with.”

“We used to have a difficult client with CLF CM. CLF CM worked hard to find different ways to address any challenging situations that arised. CLF CM is patient and understanding. Good team work.”

**“CLF CM was excellent with the client that we worked with. CLF CM was always good at advocating and providing updates with changes in care plan goals. CLF CM was compassionate, thoughtful, and very much effective in their interventions. Clients really enjoyed meeting with CLF CM as they would report during my visits with clients.”**

“CLF CM was wonderful at helping to set limits with the client and to access resources that I had no idea about.”

“They have been amazing case managers with some of the patients at our clinic. Especially CLF CM!! They deserve an award of some type (A weekend at a Spa☺)) Just sayin....”

“I have had great case management participation from CLF CMI, CLF CM2 recently and CLF CM3 and CLF CM4 in the past. **I have not worked with any CLF CM who was not efficient, prompt, creative with problem solving, diligent, and caring (especially CLF CM – if you are reading this!).**”

“CLF CM is a fantastic asset to your program. We’ve worked together on a few very difficult cases and CLF CM has an ability to develop trust and rapport with clients that I’ve not witnessed in another case manager – ever. CLF CM deserves recognition for the ongoing success of CLF client. We can all be very quick to point fingers when a case becomes unraveled; I’d like to see more attention paid to the good work of a skilled clinician like CLF CM.”

**“CLF CMI and CLF CM2; fierce advocates for their clients, amazing clinical skills, and they always follow through. Easy to get in touch with and really great with the clients. Understands the population we are working with. Always a pleasure!”**

“CLF CMI shows a great deal of compassion as well as professionalism in her interactions with their clients and other inter-agency colleagues. CLF CM is prompt in returning calls and e-mails. CLF CM really works hard on behalf of their clients. CLF CM is more than deserving of special recognition.”

“CLF CM has served as the liaison between CCT and CLF for several years. Coordinating the needs of two groups can be very challenging. CLF CM is always willing to take on tasks requested and complete paperwork as information is received. CLF CM has a cheerful, upbeat attitude, and is a pleasure to work with.”

“I have worked with CLF CMI and CLF CM2 and I found both very impressive in cases. **Case management has been a loose tool in our community where a lot of case managers don’t get involved and use terminology like ‘resistant’ or ‘needs placement’ to excuse an inability to problem solve. These MSWs are a prime example of what case management should be: competent, available, knowledgeable, and whom do not shy away from getting their hands dirty.**”

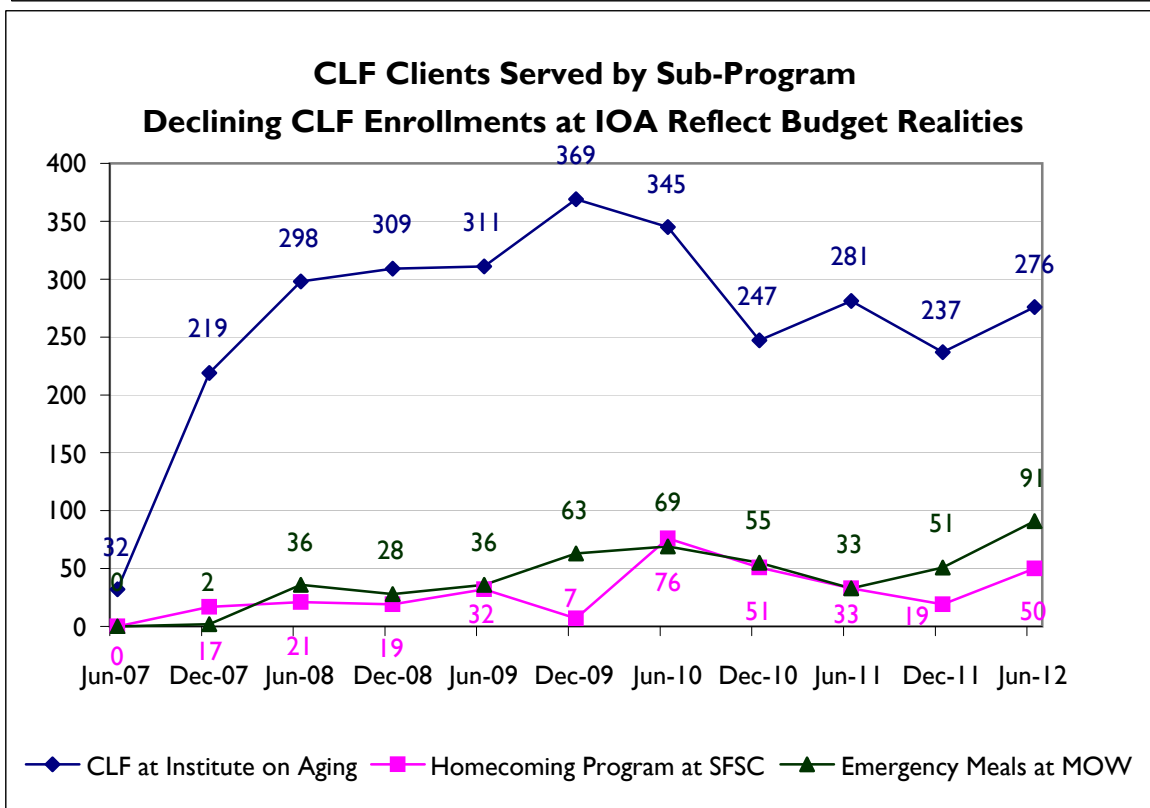
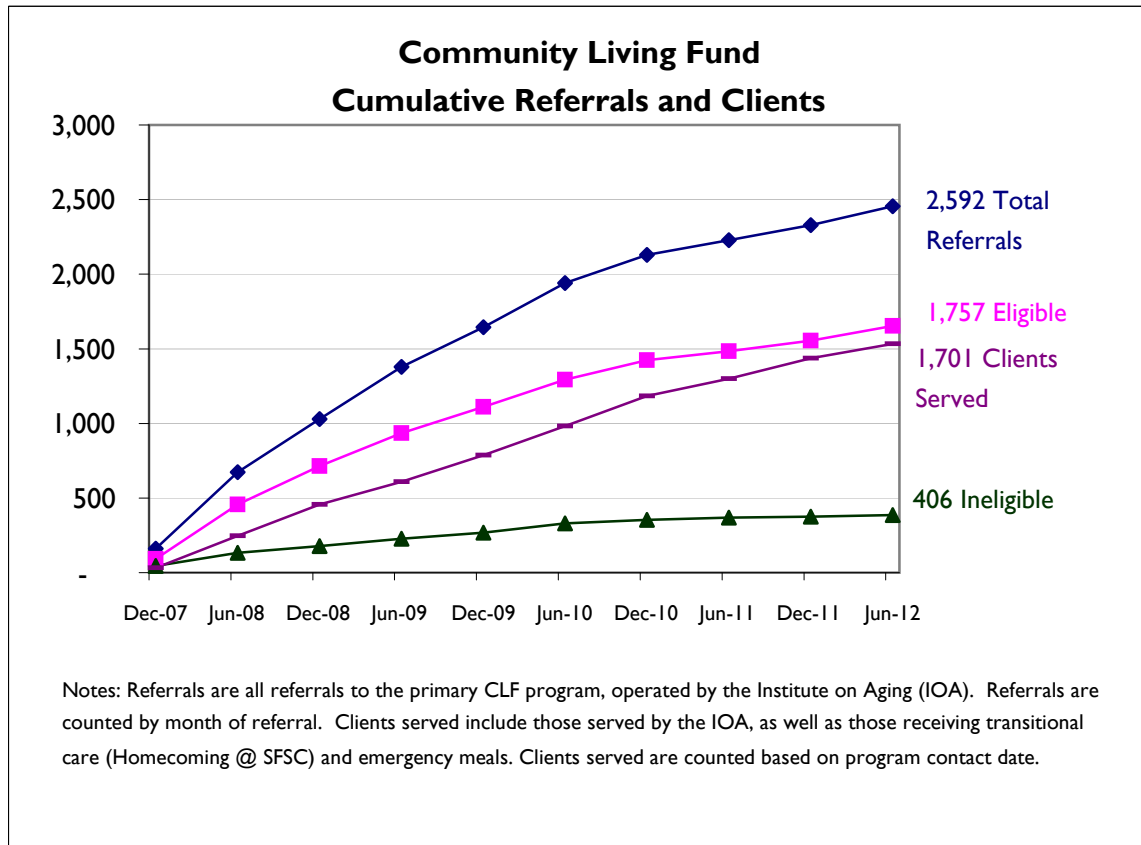
*Respondents were also asked to indicate if CLF staff had failed to meet their expectations for some reason. Those responses are below.*

“CLF CM is very quick to assign blame, making a collaborative relationship difficult. CLF CM may be great with clients, I don’t know.”

“Yes, but they are no longer working with CLF.”

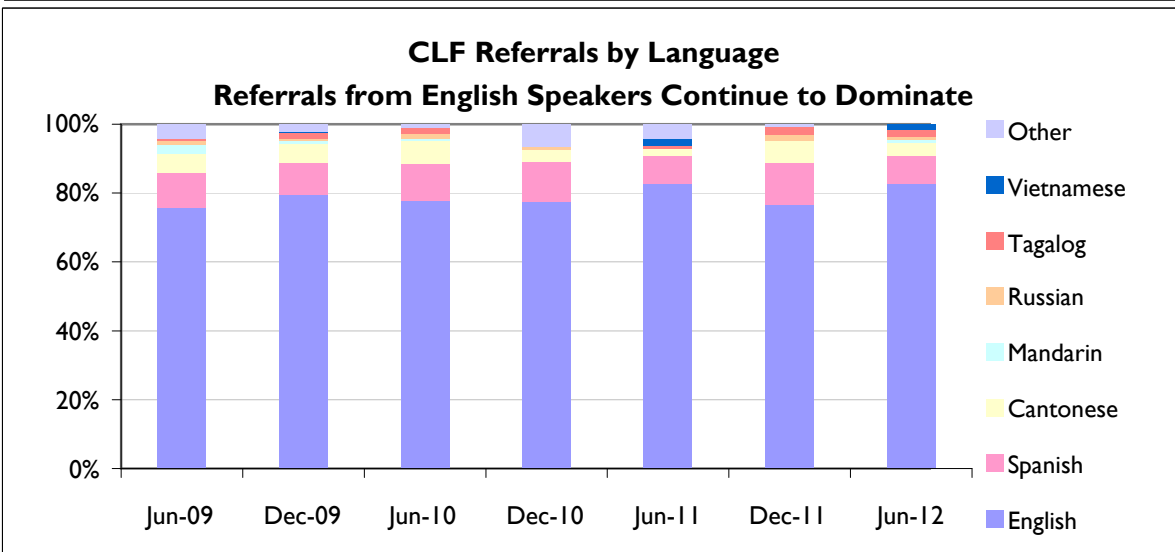
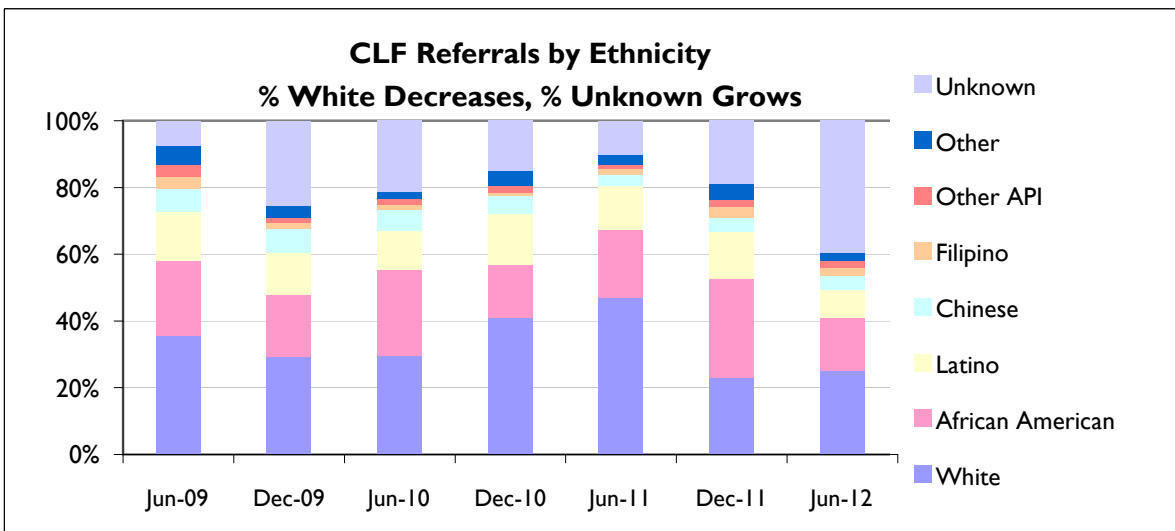
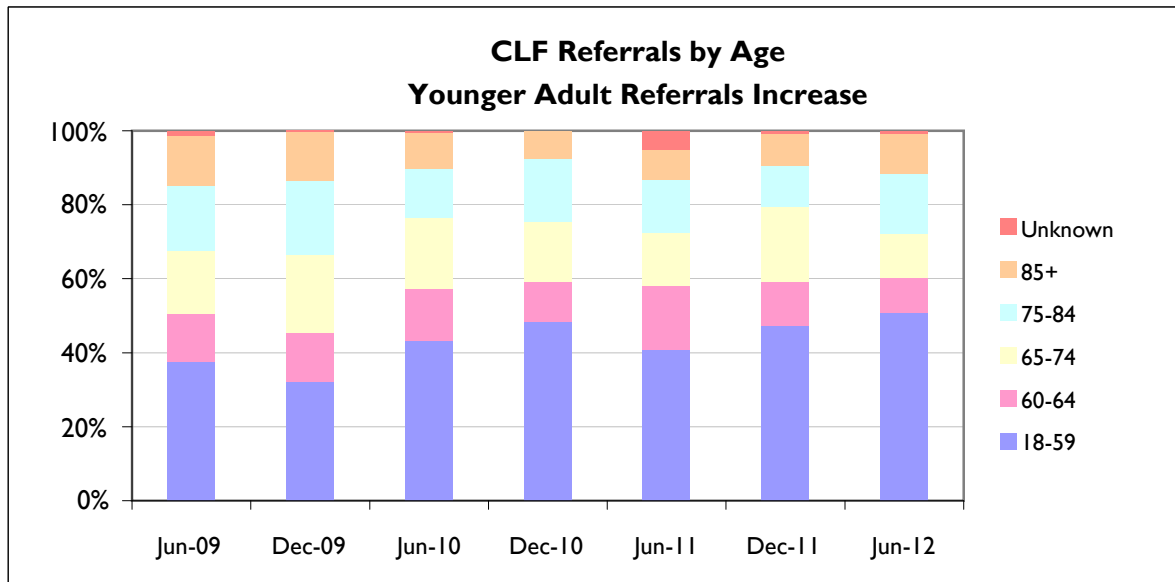
“I worked with CLF CM on a complicated case whereby I found them to be a very strong advocate and receptive and efficient in our discussions. It appeared to me at times that they struggled with their own counter-transference issues which ultimately interfered with the case.”

# Community Living Fund Six-Month Report

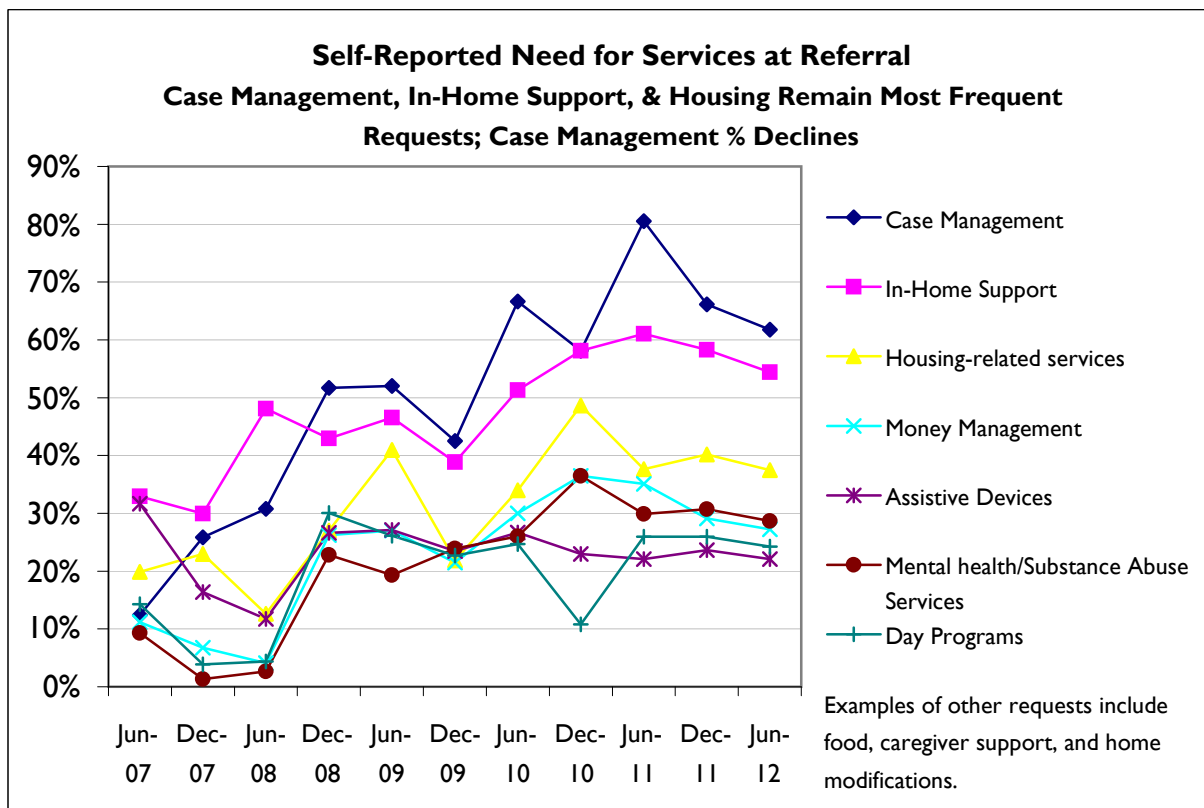
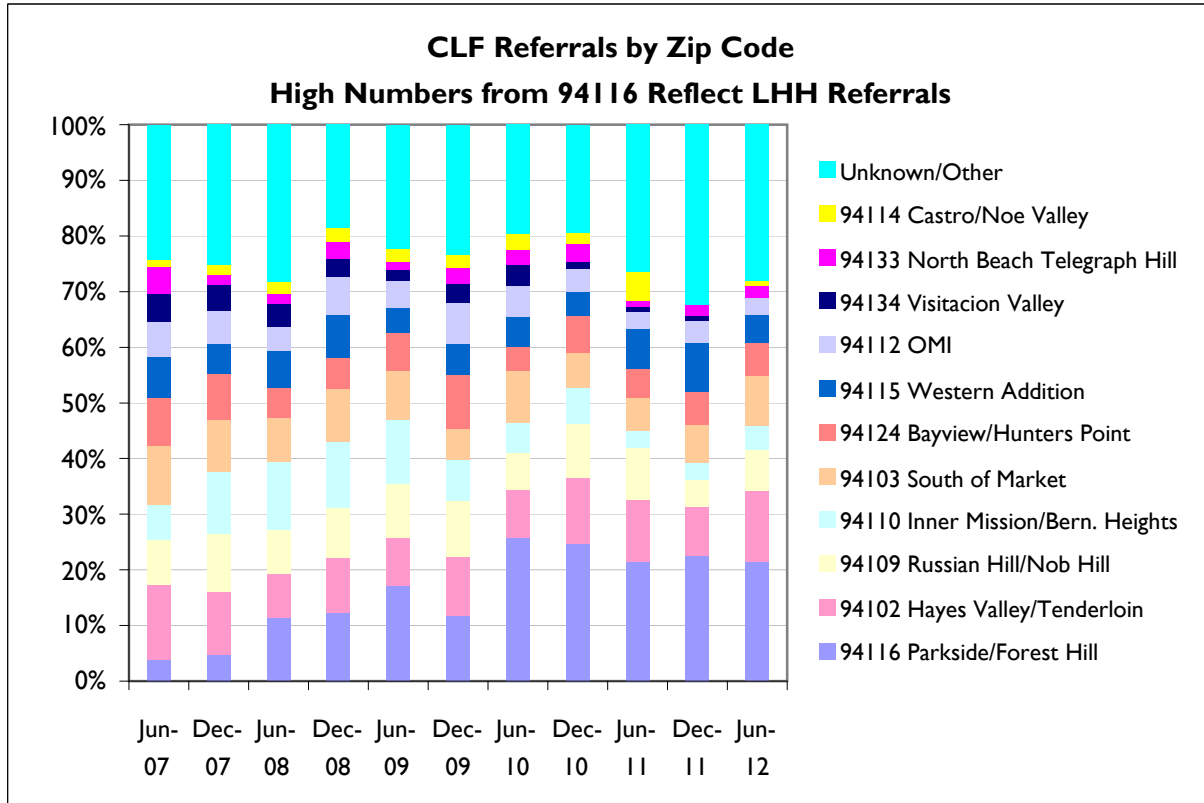




# Community Living Fund Six-Month Report

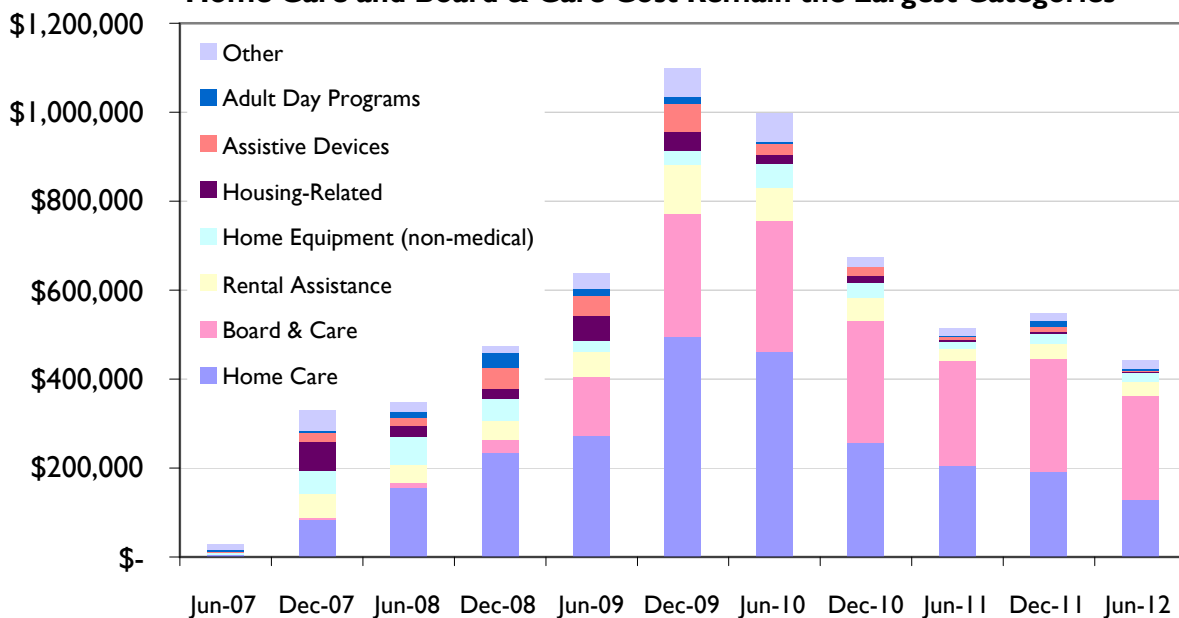


# Community Living Fund Six-Month Report

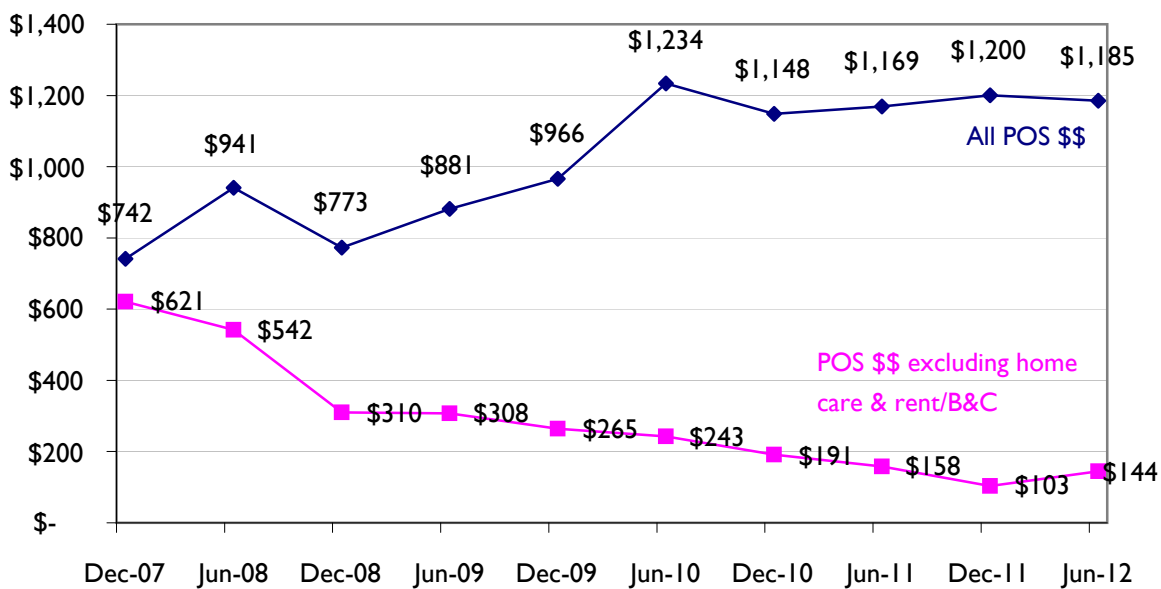


# Community Living Fund Six-Month Report

**CLF at IOA Service Purchases Decrease As Budget is Reigned In.  
Home Care and Board & Care Cost Remain the Largest Categories**



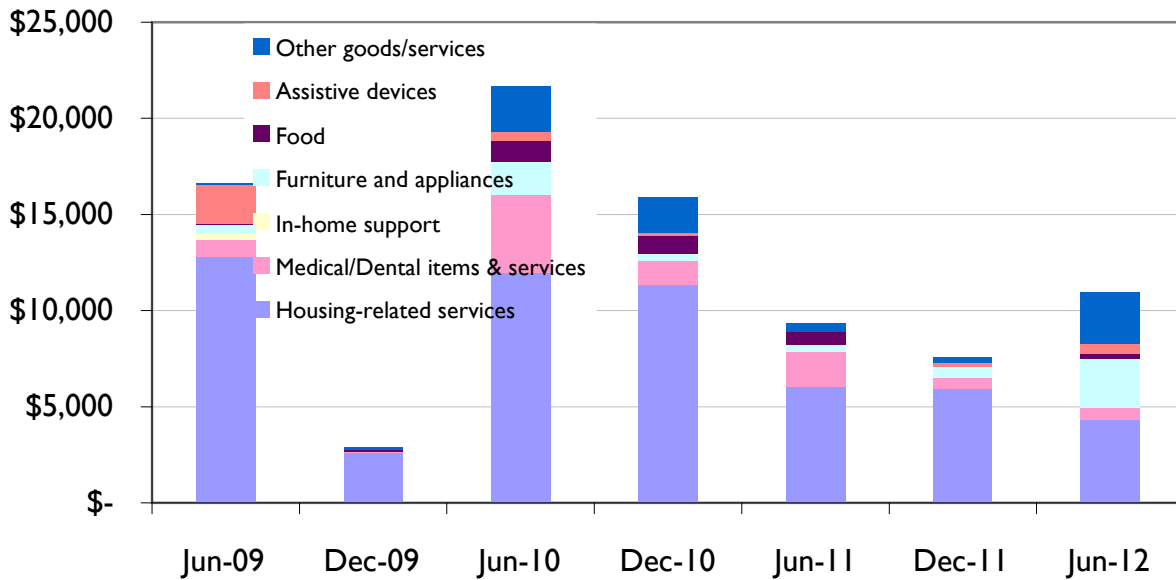
**Average Monthly Purchase of Service (POS) Cost Per Client for  
CLF Clients with Any Purchases:  
Settling at ~\$1,200/month; POS costs excluding home care &  
rent/board and care no longer steadily declining**



Note: Purchases in this chart represent those from the Institute on Aging sub-program of CLF.

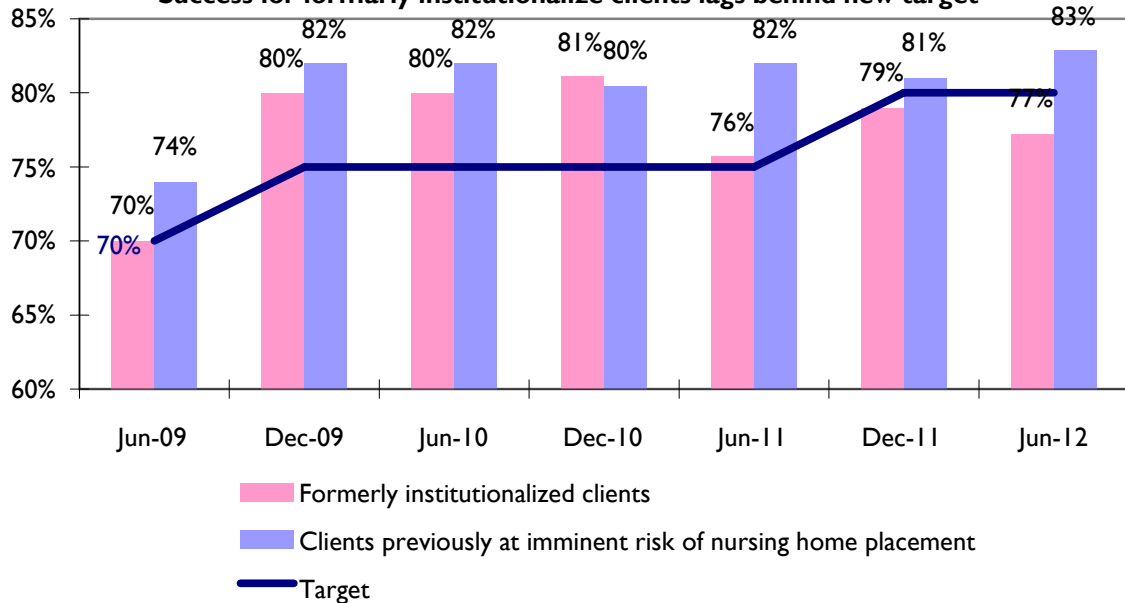
# Community Living Fund Six-Month Report

## Homecoming Purchases Still Dominated by Housing-Related Services



## Percentage of CLF clients who have successfully continued community living for a period of at least six months:

Success for formerly institutionalized clients lags behind new target



## Community Living Fund Six-Month Report

Active Caseload	Jun-09		Dec-09		Jun-10		Dec-10		Jun-11		Dec-11		Jun-12	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
<b>All Active Cases*</b>	374		435		478		345		344		301		405	
Change from Prior 6 Months	27	7.8%	61	16.3%	43	9.9%	(133)	-27.8%	(1)	-0.3%	(43)	-12.5%	104	34.6%
Change from Previous Year	29	8.4%	88	25.4%	104	27.8%	(90)	-20.7%	(134)	-28.0%	(44)	-12.8%	61	17.7%
Change from 2 Years	342	1068.8%	200	85.1%	133	38.6%	(2)	-0.6%	(30)	-8.0%	(134)	-30.8%	(73)	-15.3%
<b>Program Enrollment</b>														
CLF at Institute on Aging	311	83%	369	85%	345	72%	247	72%	281	82%	237	79%	276	68%
with any service purchases	213	68%	244	66%	247	72%	169	68%	134	48%	135	57%	121	44%
needing one-time purchases	18	6%	33	9%	33	10%	13	5%	17	6%	11	5%	7	3%
with no purchases	98	32%	125	34%	98	28%	78	32%	147	52%	102	43%	155	56%
Homecoming Program at SFSC	32	9%	7	2%	76	16%	51	15%	33	10%	19	6%	50	12%
Emergency Meals at MOW	36	10%	63	14%	69	14%	55	16%	33	10%	51	17%	91	22%
<b>Program to Date</b>														
All CLF Enrollment	787		982		1183		1299		1436		1533		1701	
CLF at Institute on Aging Enrollment	634	81%	766	78%	843	71%	873	67%	952	66%	988	64%	1038	61%
with any service purchases	467	74%	559	73%	622	74%	652	75%	693	73%	731	74%	760	73%
needing one-time purchases	130	21%	130	17%	166	20%	169	19%	183	19%	184	19%	184	18%
with no purchases	167	26%	207	27%	221	26%	221	25%	259	27%	257	26%	278	27%
Average monthly \$/client (all clients, all \$)	\$ 1,067		\$ 888		\$ 981		\$ 780		\$ 787		\$ 870		\$ 670	
Average monthly purchase of service \$/client for CLF IOA purchase clients	\$ 966		\$ 1,234		\$ 1,148		\$ 1,169		\$ 1,200		\$ 1,185		\$ 1,068	
Average monthly purchase of service \$/client for CLF IOA purchase clients, excluding home care, housing subsidies	\$ 265		\$ 243		\$ 191		\$ 158		\$ 103		\$ 144		\$ 115	
*Includes clients enrolled with Institute on Aging, Homecoming, and Emergency Meals.														

## Community Living Fund Six-Month Report

Referrals	Jun-09		Dec-09		Jun-10		Dec-10		Jun-11		Dec-11		Jun-12	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
<b>New Referrals**</b>	266		297		189		98		101		127		136	
Change from previous six months	(82)	-24%	31	12%	(108)	-36%	(91)	-48%	3	3%	26	26%	9	7%
Change from previous year	(91)	-25%	(51)	-15%	(77)	-29%	(199)	-67%	(88)	-47%	29	30%	35	35%
<b>Status After Initial Screening</b>														
Eligible:	177	67%	183	62%	129	68%	61	62%	71	70%	99	78%	103	76%
<i>Approved to Receive Service</i>	135	76%	131	72%	52	40%	31	51%	57	80%	67	68%	49	48%
<i>Wait List</i>	42	24%	51	28%	73	57%	30	49%	13	18%	31	31%	42	41%
<i>Pending Final Review</i>	0	0%	1	1%	4	3%	0	0%	1	1%	1	1%	12	12%
Ineligible	42	16%	61	21%	23	12%	15	15%	7	7%	12	9%	19	14%
Withdraw Application	32	12%	51	17%	23	12%	9	9%	11	11%	14	11%	14	10%
Pending Initial Determination	15	6%	2	1%	14	7%	13	13%	10	10%	2	2%	0	0%
Program to Date														
Total Referrals	1,644		1,941		2,130		2,228		2,329		2,456		2,592	
Eligible Referrals	1,111	68%	1,294	67%	1,423	67%	1,484	67%	1,555	67%	1,654	67%	1,757	68%
Ineligible Referrals	269	16%	330	17%	353	17%	368	17%	375	16%	387	16%	406	16%
** New Referrals include all referrals received by the DAAS Intake and Screening Unit in the six-month period.														

## Community Living Fund Six-Month Report

Referral Demographics	Jun-07	Dec-07	Jun-08	Dec-08	Jun-09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12
<b>Age (in years)</b>											
18-59	32%	31%	30%	31%	38%	32%	43%	48%	41%	47%	51%
60-64	11%	13%	10%	11%	13%	13%	14%	11%	17%	12%	10%
65-74	19%	22%	21%	20%	17%	21%	19%	16%	14%	20%	12%
75-84	24%	21%	22%	24%	18%	20%	13%	17%	14%	11%	16%
85+	14%	12%	17%	14%	14%	13%	10%	8%	8%	9%	11%
Unknown	0%	1%	0%	0%	1%	0%	1%	0%	5%	1%	1%
<b>Ethnicity</b>											
White	34%	32%	30%	26%	36%	29%	30%	41%	47%	23%	25%
African American	26%	25%	19%	21%	23%	18%	26%	16%	20%	30%	16%
Latino	17%	14%	19%	15%	14%	13%	12%	15%	13%	14%	8%
Chinese	12%	10%	8%	14%	7%	7%	6%	5%	3%	4%	4%
Filipino	4%	6%	5%	6%	4%	2%	2%	1%	2%	3%	2%
Other API	4%	2%	3%	5%	4%	1%	2%	2%	1%	2%	2%
Other	2%	2%	2%	2%	6%	4%	2%	4%	3%	5%	2%
Unknown	1%	9%	15%	11%	7%	25%	21%	15%	10%	19%	40%
<b>Language</b>											
English	68%	68%	68%	63%	76%	79%	78%	77%	83%	77%	83%
Spanish	13%	11%	15%	13%	10%	9%	11%	12%	8%	12%	8%
Cantonese	10%	7%	5%	9%	5%	6%	7%	3%	2%	6%	4%
Mandarin	2%	1%	2%	2%	3%	1%	1%	0%	0%	0%	1%
Russian	3%	0%	1%	1%	1%	1%	2%	1%	0%	2%	1%
Tagalog	1%	4%	2%	5%	0%	2%	2%	0%	1%	2%	2%
Vietnamese	1%	0%	1%	1%	0%	0%	0%	0%	2%	0%	2%
Other	2%	7%	6%	6%	4%	2%	1%	6%	4%	1%	0%

## Community Living Fund Six-Month Report

Referral Demographics (cont.)	Jun-07	Dec-07	Jun-08	Dec-08	Jun-09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12
<b>Zipcode</b>											
94102 Hayes Valley/Tenderloin	14%	11%	8%	10%	9%	10%	9%	12%	11%	10%	13%
94103 South of Market	11%	9%	8%	9%	9%	6%	9%	6%	6%	7%	9%
94107 Potrero Hill	4%	4%	4%	1%	2%	2%	2%	0%	1%	0%	1%
94108 Chinatown	1%	1%	1%	1%	0%	1%	0%	1%	0%	0%	1%
94109 Russian Hill/Nob Hill	8%	10%	8%	9%	10%	10%	7%	10%	9%	5%	7%
94110 Inner Mission/Bernal Heights	6%	11%	12%	12%	11%	7%	5%	6%	3%	4%	4%
94112 Outer Mission/Excelsior/Ingleside	6%	6%	4%	7%	5%	7%	5%	4%	3%	4%	3%
94114 Castro/Noe Valley	1%	2%	2%	2%	2%	2%	3%	2%	5%	0%	1%
94115 Western Addition	7%	5%	7%	8%	5%	6%	5%	4%	7%	9%	5%
94116 Parkside/Forest Hill	4%	5%	11%	12%	17%	12%	26%	25%	21%	23%	21%
94117 Haight/Western Addition/Fillmore	3%	3%	2%	3%	2%	3%	1%	3%	1%	0%	3%
94118 Inner Richmond/Presidio/Laurel	0%	2%	5%	1%	2%	1%	1%	2%	2%	2%	1%
94121 Outer Richmod/Sea Cliff	4%	1%	3%	2%	2%	3%	1%	4%	0%	0%	1%
94122 Sunset	2%	2%	2%	3%	5%	2%	2%	1%	3%	2%	1%
94123 Marina/Cow Hollow	1%	2%	2%	1%	1%	0%	2%	0%	0%	0%	2%
94124 Bayview/Hunters Point	9%	8%	5%	6%	7%	10%	4%	6%	5%	6%	6%
94127 West Portal/St. Francisc Wood	1%	1%	2%	1%	1%	1%	1%	0%	0%	0%	0%
94129 Presidio	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
94130 Treasure Island	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
94131 Twin Peaks/Diamond Hts/Glen Park	1%	0%	4%	1%	0%	3%	1%	2%	2%	1%	3%
94132 Stonestown/Lake Merced	2%	2%	2%	1%	1%	1%	4%	0%	3%	2%	1%
94133 North Beach Telegraph Hill	5%	2%	2%	3%	2%	3%	3%	3%	1%	2%	2%
94134 Visitacion Valley	5%	5%	4%	3%	2%	3%	4%	1%	1%	1%	0%
Unknown/Other	7%	7%	3%	4%	5%	6%	7%	5%	14%	23%	13%
Referral Source = Laguna Honda Hospital/TCM	4%	10%	9%	13%	18%	14%	26%	31%	27%	30%	30%



## Community Living Fund Six-Month Report

	Jun-07	Dec-07	Jun-08	Dec-08	Jun-09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12
<b>Services Needed at Intake (Self-Reported)</b>											
Case Management	12%	26%	31%	52%	52%	43%	67%	58%	81%	66%	50%
In-Home Support	33%	30%	48%	43%	47%	39%	51%	58%	61%	58%	47%
Housing-related services	20%	23%	13%	27%	41%	22%	34%	49%	38%	40%	34%
Money Management	11%	7%	4%	26%	27%	21%	30%	36%	35%	29%	20%
Assistive Devices	32%	16%	12%	27%	27%	23%	27%	23%	22%	24%	19%
Mental health/Substance Abuse Services	9%	1%	3%	23%	19%	24%	26%	36%	30%	31%	32%
Day Programs	14%	4%	4%	30%	26%	23%	25%	11%	26%	26%	21%
Food	6%	4%	4%	17%	16%	11%	23%	26%	25%	23%	23%
Caregiver Support	8%	2%	3%	15%	23%	18%	17%	23%	18%	19%	10%
Home repairs/Modifications	9%	9%	6%	13%	18%	17%	15%	19%	21%	19%	13%
Other Services	29%	34%	35%	8%	9%	18%	11%	11%	5%	13%	9%
<b>Performance Measures</b>	<b>Jun-07</b>	<b>Dec-07</b>	<b>Jun-08</b>	<b>Dec-08</b>	<b>Jun-09</b>	<b>Dec-09</b>	<b>Jun-10</b>	<b>Dec-10</b>	<b>Jun-11</b>	<b>Dec-11</b>	<b>Jun-12</b>
Percentage of CLF clients who have successfully continued community living for a period of at least six months:											
Formerly institutionalized clients		74%	73%	76%	70%	80%	80%	81%	76%	79%	77%
Clients previously at imminent risk of nursing home placement		76%	76%	76%	74%	82%	82%	80%	82%	81%	83%
Target		70%	70%	70%	70%	75%	75%	75%	75%	80%	80%

## Community Living Fund Six-Month Report

Expenditures	Jun-09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12	Project to Date
IOA Contract								
Purchase of Service *	\$ 771,422	\$ 1,012,599	\$ 1,047,504	\$ 659,690	\$ 519,910	\$ 523,924	\$ 489,096	\$ 6,061,031
CBAS Appeals							\$ 188,760	\$ 188,760
Case Management	\$ 883,898	\$ 632,884	\$ 708,179	\$ 501,173	\$ 511,467	\$ 516,899	\$ 558,607	\$ 5,395,516
Capital & Equipment	\$ 39,040	\$ 78,209						\$ 177,428
Operations	\$ 194,094	\$ 92,637	\$ 196,445	\$ 166,522	\$ 189,541	\$ 145,712	\$ 170,462	\$ 1,538,341
Indirect			\$ 112,071	\$ 91,964	\$ 93,463	\$ 91,619	\$ 99,617	\$ 488,734
CCT Reimbursement				\$ (143,388)	\$ (74,454)	\$ (45,329)	\$ (132,205)	\$ (395,376)
Medication Management (FY1011 only)				\$ 21,586	\$ 6,226	\$ 265		\$ 28,077
<i>Subtotal</i>	\$ 1,888,454	\$ 1,816,329	\$ 2,064,199	\$ 1,297,547	\$ 1,246,153	\$ 1,233,090	\$ 1,374,337	\$ 13,482,511
DPH Work Orders								\$ -
Health at Home	\$ 217,860	\$ 228,231	\$ 150,898					\$ 1,055,945
RTZ – DCIP		\$ 40,000	\$ 80,000		\$ 120,000	\$ 40,000	\$ 80,000	\$ 360,000
DAAS Internal (Salaries & Fringe)	\$ 188,308	\$ 170,398	\$ 181,920	\$ 176,924	\$ 185,828	\$ 214,132	\$ 59,485	\$ 1,836,593
Homecoming Services Network & Research (SFSC)	\$ 12,301	\$ 1,118	\$ 89,173	\$ 17,871	\$ 13,568	\$ 7,553	\$ 10,937	\$ 176,470
Emergency Meals (Meals on Wheels)	\$ 88,161	\$ 61,065	\$ 67,778	\$ 60,000	\$ -	\$ 36,022	\$ 23,978	\$ 477,981
IT Contractor								\$ 298,270
Case Management Training Institute (Family Service Agency)			\$ 85,690	\$ 62,119	\$ 57,881	\$ 40,850	\$ 79,150	\$ 325,690
IHSS Share of Cost			\$ 93,454					\$ 93,454
<b>Grand Total</b>	<b>\$ 2,395,084</b>	<b>\$ 2,317,141</b>	<b>\$ 2,813,112</b>	<b>\$ 1,614,461</b>	<b>\$ 1,623,430</b>	<b>\$ 1,571,647</b>	<b>\$ 1,627,887</b>	<b>\$ 16,479,027</b>
	<b>FY0809</b>	<b>FY0910</b>	<b>FY1011</b>	<b>FY1112</b>	<b>Project to Date</b>			
Total CLF Fund Budget	\$ 3,000,000	\$ 3,000,000	\$ 3,595,877	\$ 3,588,517	\$ 19,197,392			
% DAAS Internal of Total CLF Fund**	12.0%	11.7%	10.1%	7.6%	9.6%			
<p>* This figure does not match the figure in Section 4 of this report because this figure reflects the date of invoice to HSA, while the other reflects the date of service to the client.</p>								
<p>** According to the CLF's establishing ordinance, "In no event shall the cost of department staffing associated with the duties and services associated with this fund exceed 15% [...] of the total amount of the fund." When the most recent six-month period falls in July-December, total funds available are pro-rated to reflect half of the total annual fund.</p>								

## Community Living Fund Six-Month Report

CLF @ IOA Purchased Services	Jun-09		Dec-09		Jun-10		Dec-10		Jun-11		Dec-11		Jun-12		Project-to-Date	
	\$	Clients	\$	Clients	\$	Clients	\$	Clients	\$	Clients	\$	Clients	\$	Clients	\$	Clients
<b>Total</b>	\$ 638,828	213	\$ 1,098,758	244	\$ 996,867	247	\$ 675,426	169	\$ 514,228	134	\$ 547,672	135	\$ 442,999	121	\$ 6,095,019	760
Home Care	\$ 271,585	31	\$ 494,459	53	\$ 460,160	43	\$ 257,378	23	\$ 204,550	20	\$ 191,837	27	\$ 129,657	18	\$ 2,486,832	166
Board & Care	\$ 133,383	21	\$ 277,878	35	\$ 296,902	33	\$ 274,449	30	\$ 237,365	29	\$ 253,920	31	\$ 234,556	28	\$ 1,755,838	46
Rental Assistance (General)	\$ 57,004	34	\$ 109,850	50	\$ 74,381	42	\$ 51,366	31	\$ 27,116	21	\$ 33,854	26	\$ 29,585	24	\$ 521,553	202
Non-Medical Home Equipment	\$ 23,701	72	\$ 30,534	80	\$ 51,667	98	\$ 34,134	51	\$ 15,730	40	\$ 22,425	35	\$ 20,105	30	\$ 366,414	452
Housing-Related	\$ 55,979	53	\$ 44,233	58	\$ 20,190	51	\$ 13,780	22	\$ 3,211	19	\$ 4,656	19	\$ 1,802	9	\$ 253,992	240
Assistive Devices	\$ 47,008	66	\$ 62,214	76	\$ 24,433	33	\$ 20,179	36	\$ 7,917	19	\$ 12,053	25	\$ 3,949	19	\$ 266,796	303
Adult Day Programs	\$ 16,010	3	\$ 14,423	4	\$ 6,113	4	\$ 1,865	2	\$ 1,920	1	\$ 11,936	6	\$ 3,178	1	\$ 109,269	18
Communication/Translation	\$ 8,384	58	\$ 10,827	75	\$ 11,239	69	\$ 7,196	37	\$ 2,387	20	\$ 2,162	16	\$ 1,067	12	\$ 59,103	194
Respite	\$ 200	1	\$ 5,571	2	\$ 9,488	2	\$ 4,056	1	\$ -	0	\$ 153	1	\$ -	0	\$ 43,060	8
Health Care	\$ 811	2	\$ 11,194	8	\$ 8,571	10	\$ 3,156	7	\$ 2,662	8	\$ 4,629	8	\$ 1,935	3	\$ 44,705	47
Medical Services	\$ 8,580	4	\$ 7,665	13	\$ 2,926	6	\$ 1,122	4	\$ 2,693	4	\$ -	0	\$ 500	1	\$ 38,241	47
Other Special Needs	\$ 1,226	12	\$ 5,884	13	\$ 7,511	11	\$ 813	7	\$ 3,477	5	\$ 652	3	\$ -	0	\$ 29,094	75
Counseling	\$ 5,799	16	\$ 6,350	13	\$ 8,150	14	\$ 3,750	12	\$ 4,800	5	\$ 5,000	7	\$ 7,650	17	\$ 41,499	45
Professional Care Assistance	\$ 6,996	4	\$ 7,624	3	\$ 2,553	3	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ 17,917	12
Habilitation	\$ 300	1	\$ 4,950	2	\$ 10,088	4	\$ 1,450	2	\$ -	0	\$ 825	1	\$ 2,625	1	\$ 20,238	7
Transportation	\$ 1,043	20	\$ 2,220	18	\$ 1,568	16	\$ 693	11	\$ 401	9	\$ 495	9	\$ 355	6	\$ 17,290	77
Legal Assistance	\$ 19	1	\$ 2,757	5	\$ -	1	\$ 40	1	\$ -	0	\$ 312	1	\$ 85	1	\$ 5,207	14
Others	\$ 799	5	\$ 125	5	\$ 926	5	\$ -	0	\$ -	0	\$ 2,763	3	\$ 5,950	4	\$ 17,971	42
<b>Homecoming @ SFSC</b>																
<b>Purchases</b>	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
<b>Total</b>	\$16,588.08		\$ 2,888.69		\$21,649.96		\$ 15,878.95		\$ 9,369.20		\$7,552.54		\$10,936.59		#####	
Housing-related services	\$ 12,824	77%	\$ 2,608	90%	\$ 11,981	55%	\$ 11,351	71%	\$ 6,028	64%	\$ 5,942	79%	\$ 4,308	39%	\$66,977	62%
Medical/Dental items & services	\$ 891	5%	\$ 16	1%	\$ 4,052	19%	\$ 1,226	8%	\$ 1,828	20%	\$ 560	7%	\$ 655	6%	\$9,680	9%
In-home support	\$ 265	2%	\$ -	0%	\$ -	0%	\$ -	0%		0%		0%	\$ -	0%	\$4,967	5%
Furniture and appliances	\$ 486	3%	\$ -	0%	\$ 1,690	8%	\$ 369	2%	\$ 371	4%	\$ 552	7%	\$ 2,541	23%	\$7,065	7%
Food	\$ 65	0%	\$ 149	5%	\$ 1,091	5%	\$ 930	6%	\$ 676	7%	\$ 28	0%	\$ 246	2%	\$4,725	4%
Assistive devices	\$ 1,991	12%	\$ -	0%	\$ 493	2%	\$ 149	1%	\$ 25	0%	\$ 185	2%	\$ 525	5%	\$3,837	4%
Other goods/services	\$ 67	0%	\$ 116	4%	\$ 2,342	11%	\$ 1,855	12%	\$ 441	5%	\$ 284	4%	\$ 2,661	24%	\$10,299	10%