
MEMORANDUM

DATE: September 29, 2015

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
Carrie Wong, Long Term Care Operations Director

SUBJECT: Community Living Fund (CLF): Program for Case Management and Purchase of Resources and Services. Six Month Report: Jan-June, 2015

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, along with project-to-date figures where appropriate.

KEY FINDINGS

Referrals & Service Levels

- ❖ The CLF received 144 total new referrals, of which most (85%) were eligible. This increase in referrals (up from 111 in the last period) is similar to referral levels seen in FY 13-14.
- ❖ 659 clients received service, which is the most ever served in a six month period. As seen in the prior six month period, this increase was driven primarily by growth in the client population served by transitional care purchases through the San Francisco Senior Center (SFSC), a subsidiary of Northern California Presbyterian Homes and Services (NCPHS). The DAAS San Francisco Transitional Care Program (SFTCP) lacked flexible funding, and these purchases were provided to SFTCP clients who

meet CLF eligibility criteria. DAAS focused on expanding the SFTCP program last year, which resulted in a significant increase in referrals.

- ❖ Enrollment in the core services provided by the Institute on Aging (IOA) peaked at 369 during July – December 2009 and is now at 256. Over the last two years, the program has typically served around 300 clients per period. IOA's capacity to serve clients has been impacted by multiple care manager vacancies during the last period, but the agency has made progress toward filling these positions over the last six months.
- ❖ Thirty-nine percent of program enrollees in the last six months were in the IOA's CLF program. Approximately 46% of these clients received service purchases. Meals on Wheels (MOW) emergency home-delivered meal program served only 49 (7%) CLF clients, which may be due to the enhanced support and service coordination provided by SFTCP.

Demographics

Trends in CLF referrals are relatively consistent with slight shifts over time:

- ❖ Referrals for younger adult consumers continue to represent a significant portion of referrals (39%).
- ❖ Over one-third (39%) of all referrals were from White consumers. Referrals for African Americans (24%) and Latinos (17%) continued to slightly increase. Chinese referrals decreased slightly (7%), remaining low compared to citywide demographics. Referred consumers not reporting ethnicity data continue to decline due to program staff efforts to improve data collection (down to 5% this period).
- ❖ Referrals for English-speaking clients continue to dominate (80%). The next most common language is Spanish (12%).
- ❖ Referrals for consumers living in 94116, home to Laguna Honda Hospital, continue to be high (currently 26%). Many referrals (13%) also come from consumers living in 94102, which includes the Tenderloin and Hayes Valley areas. As a comparison, the combined average of all other neighborhoods is 3%.
- ❖ Referrals from Laguna Honda Hospital remain high at 44% of all referrals.

Service Requests

- ❖ All service categories saw an increase in the percentage of referrals requesting the service. Case management (75%), in-home support (56%), and housing-related services (43%) remain among the most commonly-requested services at intake. Requests for food assistance increased from 24% to 36%. Assistive devices (30%) and mental health/substance abuse services (28%) also continue to be highly requested at the point of referral in the last six months.

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 FY14-15 were \$1.9 million, in line with the program budget.

❖ Costs per client are as follows:

- Total monthly program costs per client¹ averaged \$491 per month in the latest six-month period. This figure has continued to be well below the high of \$1,067 in January – June 2009. Declining average costs have been due, in part, to the program's increased capacity to leverage outside funding such as the NF/AH waiver and the CCT Money Follows the Person Demonstration Project.
- Average monthly purchase of service costs for CLF clients who received any purchased services was up over previous six-month periods, at \$1,606.
- Excluding costs for home care and rental subsidies, average monthly purchase of service costs for CLF clients who received any purchased services was \$264 per month in the latest reporting period, a considerable increase from the previous six-month period.

Performance Measures

DAAS is committed to measuring the impact of its investments in community services. The CLF program has consistently met and exceeded its goals to support successful community living for those discharged or at imminent risk of institutionalization. Given this demonstrated success, DAAS is shifting to focus to new performance measures in order to assess other important areas of performance. The analytical methodology is currently being refined and the third-party data vendor is working closely with DAAS and IOA to ensure the CLF database supports collection of the data needed to calculate the new measures, which should be reported beginning in FY15-16. These two new performance measures will be:

- ❖ Percent of care plan problems resolved, on average, after one year of enrollment in CLF at, at least, 80% (excludes clients with ongoing purchases).
- ❖ Percent of clients with one or fewer admissions to an acute care hospital within a six month period at least 80%.

Systemic changes / Trends affecting CLF

- ❖ There are currently seven community referrals awaiting assignment on the CLF waitlist. The oldest referral is three weeks old, which is a significant decrease in wait time from the previous six month period (which was up to an eleven month

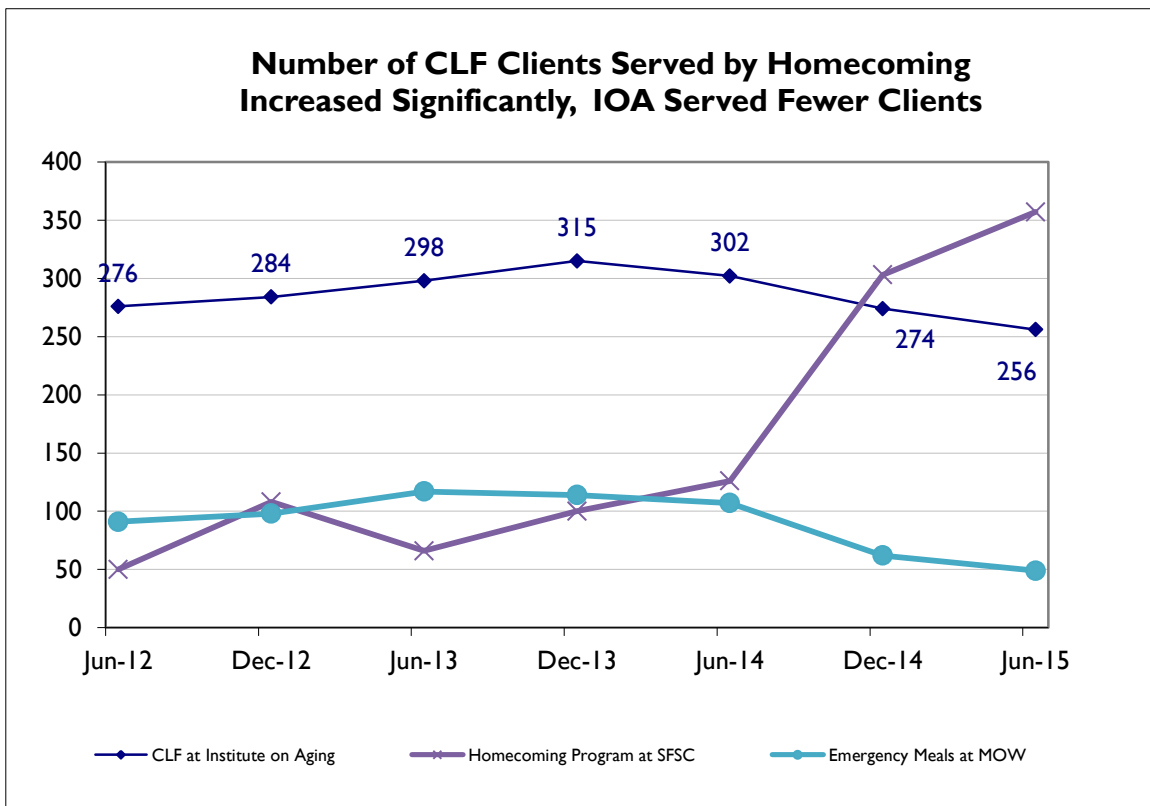
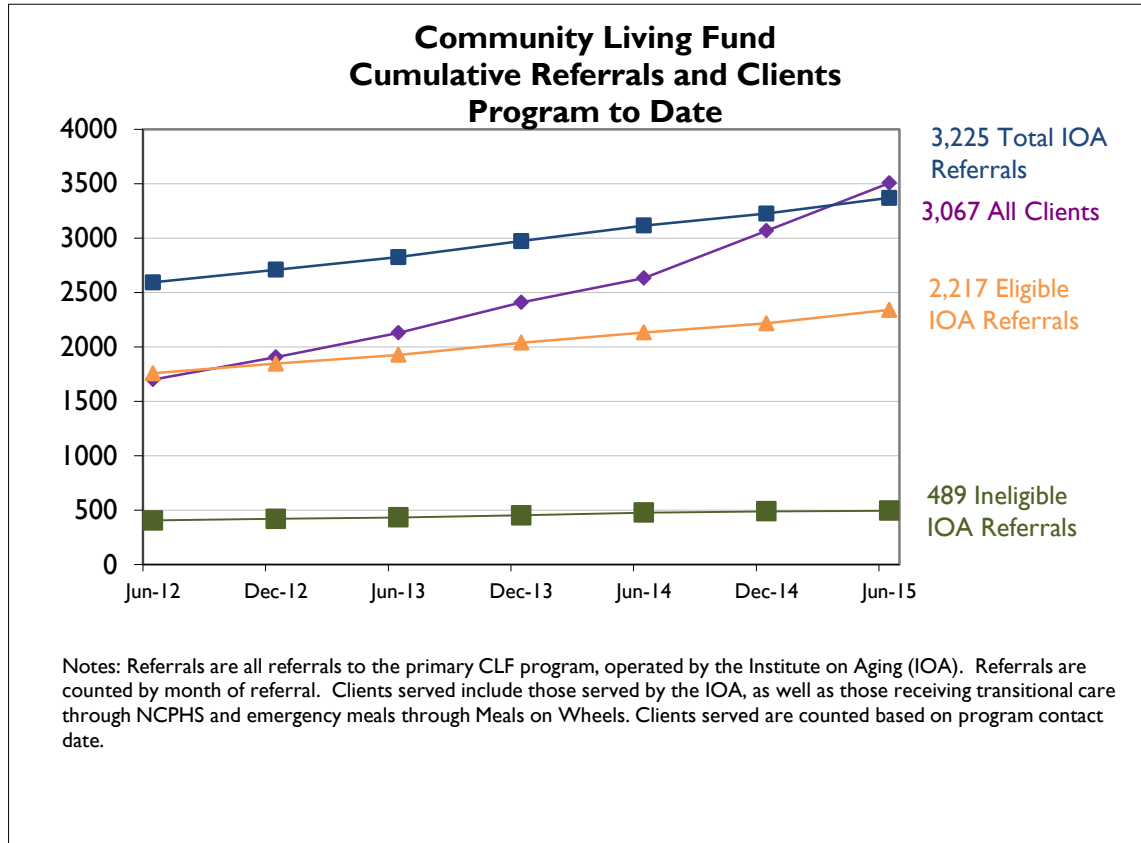
¹ This calculation = [Grand Total of CLF expenditures (from Section 3-1)] / [All Active Cases (from Section 1-1)] / 6.

wait at its maximum). Minimizing the community waitlist will make room for new referrals resulting from targeted outreach efforts.

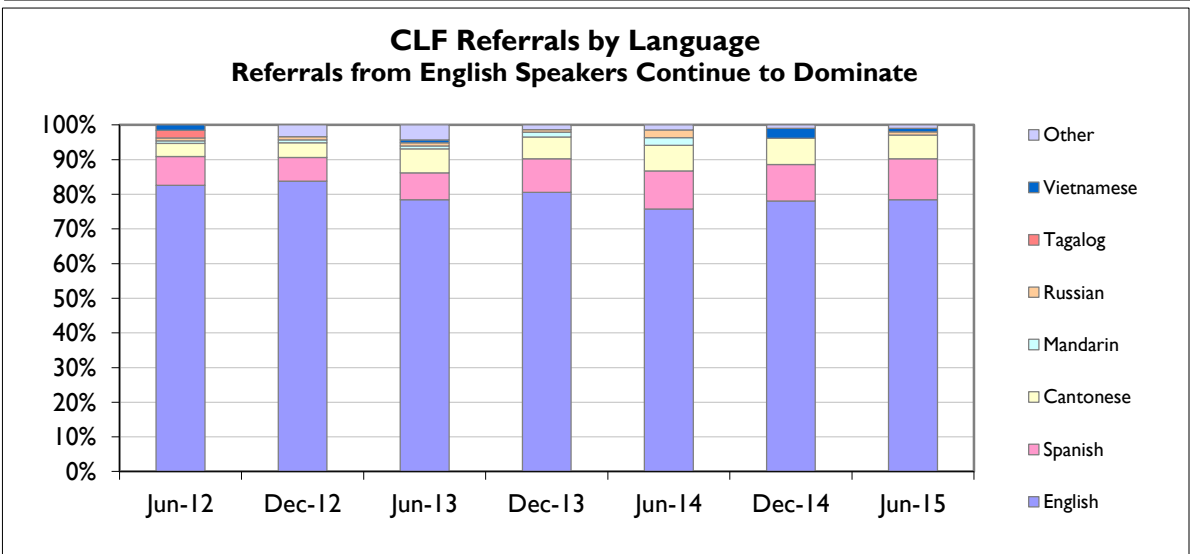
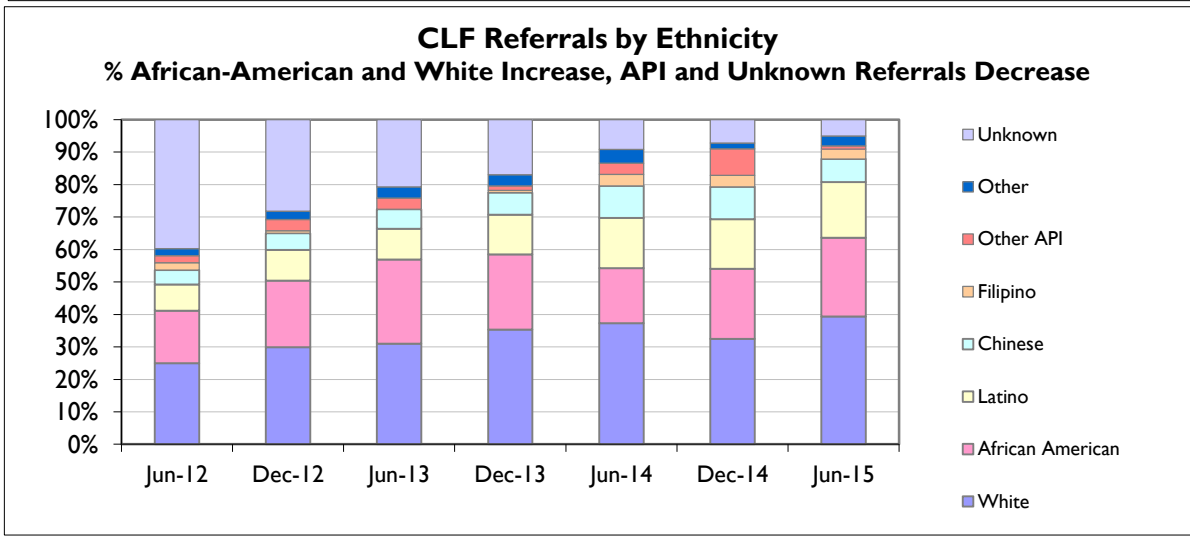
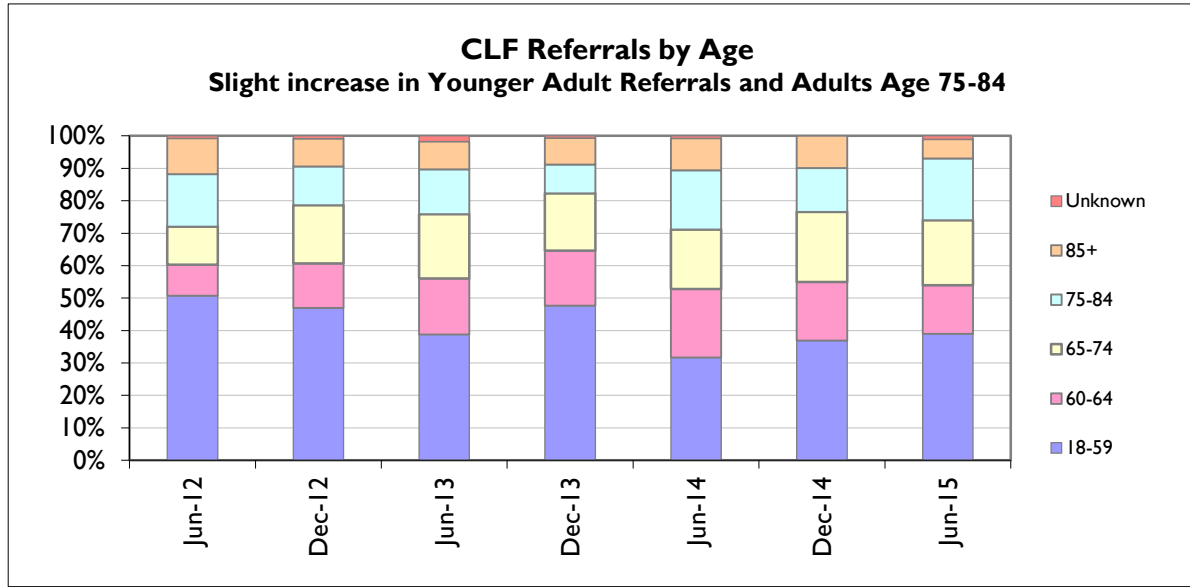
- ❖ The Annual CLF Client Satisfaction Survey was administered in June 2015. 179 clients were offered a telephonic interview and the overall response rate was 74%. The survey yielded an 85% satisfaction rating with CLF services. The survey tool with comprehensive details is attached.
- ❖ In July 2015, the CLF Integrated Psychologist completed an audit of 165 active clients. Social Worker/Care Managers participated in 1:1 qualitative interviews and statistics were obtained from the most recent signed CLF assessment. Review of client information focused on cognitive status, mental health symptoms/diagnoses, substance use, and access to mental health/substance use treatment services. Preliminary data suggest that: the majority of clients had mental health symptoms and/or diagnoses; more than one-third of CLF clients performed in the impaired range on the Mini Mental Status Exam; and clients were more likely to access mental health treatment than substance use services. Additional information will be shared in a subsequent report.
- ❖ CLF has been awarded an additional \$1 million per year beginning FY15-16 to expand services in the areas of housing, home care, home modifications. Particular attention will be given to long term care residents at Skilled Nursing Facilities (SNFs) throughout San Francisco. Historically, CLF has worked with non-Laguna Honda nursing facilities in San Francisco to support transitions home but has been limited in its ability to serve individuals whose primary barrier to returning to the community is lack of housing. CLF will begin targeted outreach to SNFs in an effort to identify clients willing and able to live in the community; this outreach will occur while simultaneously exploring housing support services provided through a Scattered Site Housing (SSH) model, which currently exists for Laguna Honda Hospital residents. Under this model, a SSH agency manages housing acquisition, serves as the master lease holder, and provides housing retention visits.
- ❖ In June 2015, CLF started supporting transitional care purchases through the IHSS Care Transitions Program. The DAAS SF Transitional Care Program contract with the Centers for Medicare and Medicaid Services ended in May 2015 with successful outcomes that included a notably low 10% re-hospitalization rate. In efforts to continue the momentum of the hospital partnership and to prevent unnecessary re-hospitalizations for a vulnerable population, the transitional care services are now being provided to IHSS eligible clients upon hospital discharge.
- ❖ The Community Options and Resource Engagement (CORE) Program, formerly the Diversion and Community Integration Program (DCIP), is in the planning and development stages with the goal to successfully transition individuals from skilled

nursing to community setting. In May 2014, DCIP meetings and access to the DCIP database stopped when a Settlement Agreement expired in a class action lawsuit that initiated the sharing of private healthcare information between Department of Public Health-Laguna Honda and DAAS. Department staff has continued to work on the scope of data sharing and finalizing a business agreement.

Community Living Fund Six-Month Report

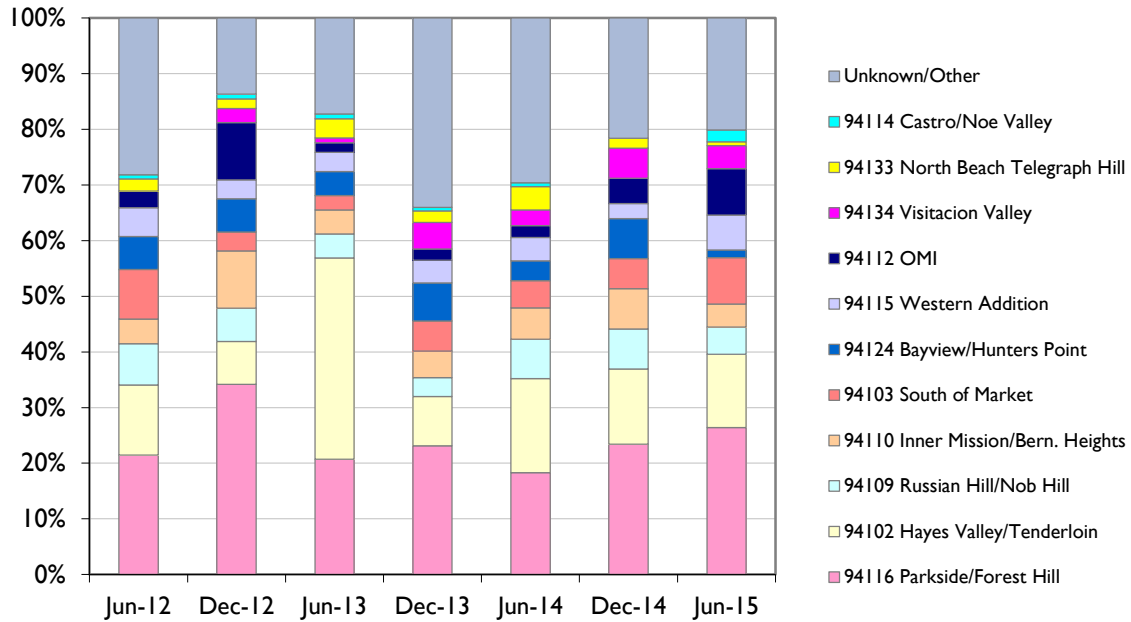


Community Living Fund Six-Month Report

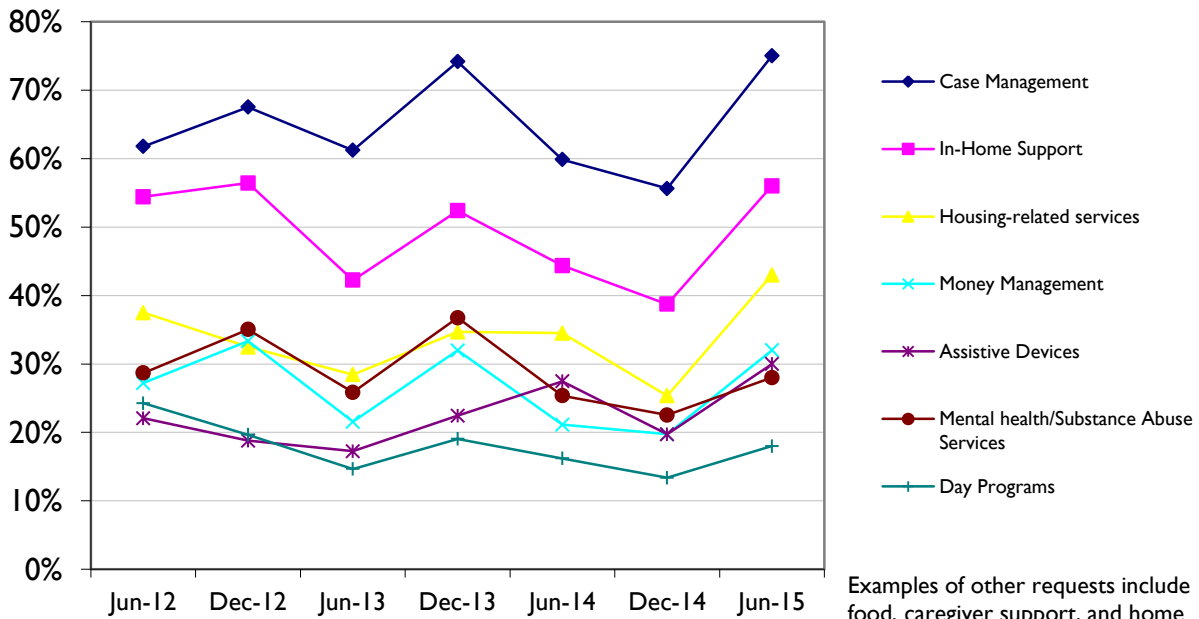


Community Living Fund Six-Month Report

CLF Referrals by Zip Code

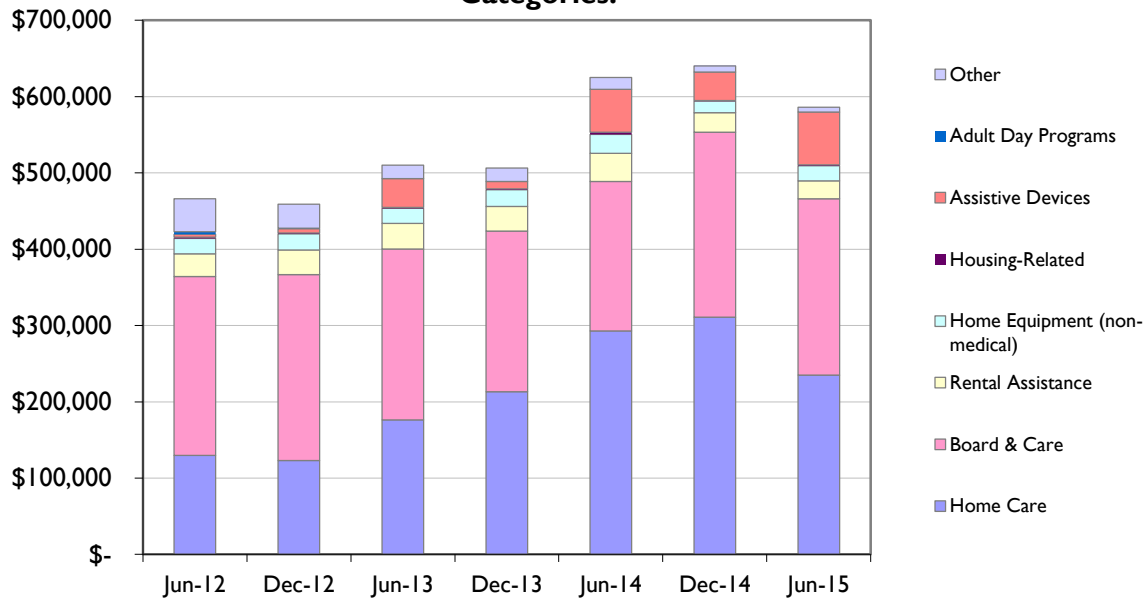


Self-Reported Need for Services at Referral Case Management, In-Home Support & Housing Remain Among the Most Frequent Requests

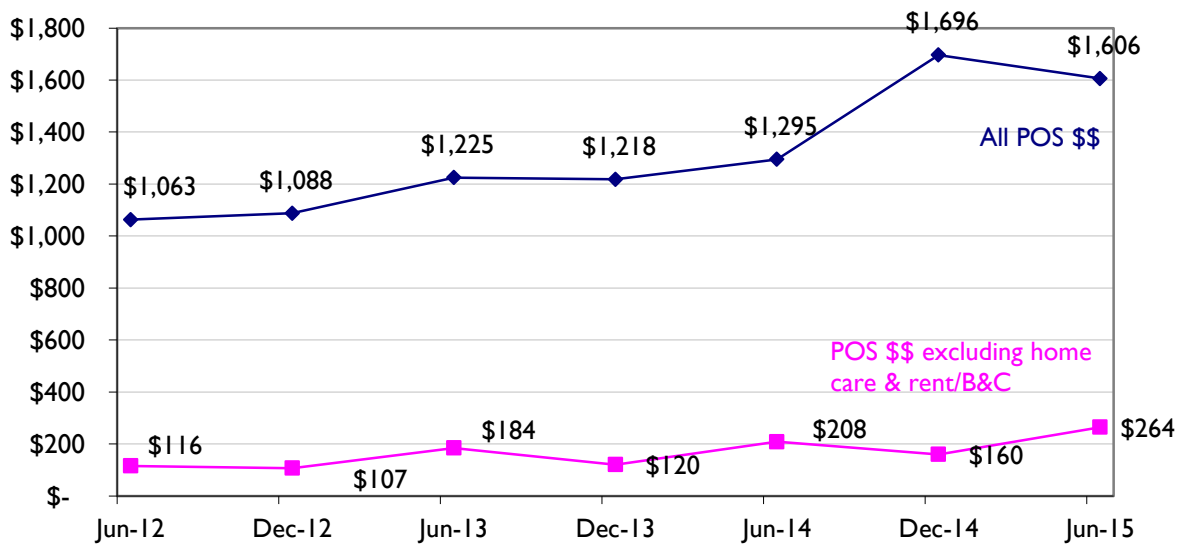


Community Living Fund Six-Month Report

Expenditures at CLF Decline Slightly. Increase in Spending on Assistive Devices. Home Care and Board & Care Remain Largest Categories.



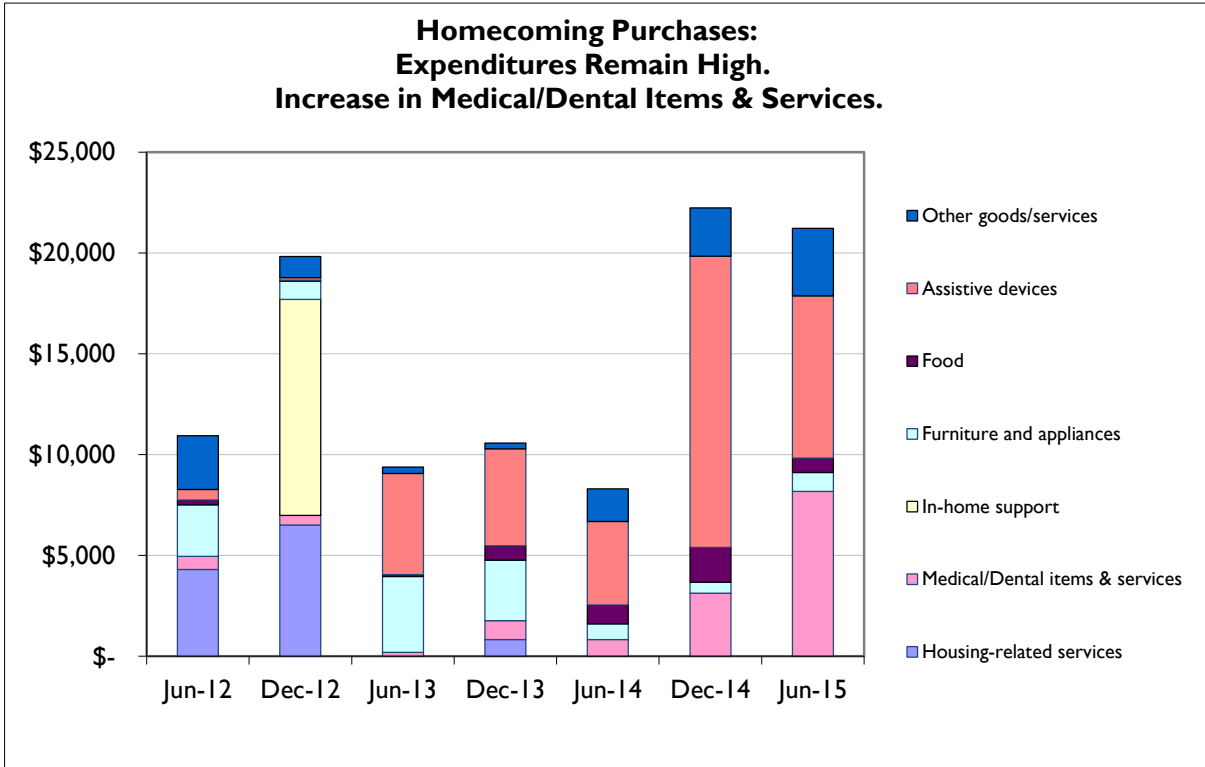
Average Monthly Purchase of Service (POS) Cost Per Client for CLF Clients with Any Purchases:
Overall rate decreases slightly, while spending rate excluding home care and B&C increased due to increased expenditures on home modifications



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

Community Living Fund Six-Month Report

**Homecoming Purchases:
Expenditures Remain High.
Increase in Medical/Dental Items & Services.**



Community Living Fund Six-Month Report

Expenditures	Jun-14	Dec-14	Jun-15	Project to Date
IOA Contract				
Purchase of Service *	\$ 662,442	\$ 612,955	\$ 637,438	\$ 9,379,248
CBAS Appeals (incl. indirect) and repayment	\$ (142,070)	\$ -		\$ 359,176
CBAS Assessments for SF Health Plan	\$ 79,765	\$ 65,998	\$ 69,599	\$ 389,090
GRACE Project	\$ 50,387	\$ -	\$ -	\$ 96,315
Case Management	\$ 623,368	\$ 577,605	\$ 613,817	\$ 9,078,074
Capital & Equipment	\$ -	\$ -	\$ -	\$ 177,428
Operations	\$ 215,670	\$ 198,881	\$ 201,198	\$ 2,791,195
Indirect	\$ 141,516	\$ 122,331	\$ 129,595	\$ 1,279,178
CCT Reimbursement	\$ (37,742)	\$ (13,260)	\$ (22,580)	\$ (688,996)
Medication Management (FY1011 only)	\$ -	\$ -	\$ -	\$ 28,077
SF Health Plan Reimbursement for CBAS	\$ (200,200)		\$ (202,840)	\$ (572,480)
Subtotal	\$ 1,393,136	\$ 1,564,510	\$ 1,426,227	\$ 22,316,305
DPH Work Orders				\$ -
Health at Home				\$ 1,055,945
RTZ – DCIP	\$ 60,000	\$ 40,000	\$ 80,000	\$ 720,000
DAAS Internal (Salaries & Fringe)	\$ 170,249	\$ 182,115	\$ 157,932	\$ 2,897,264
Homecoming Services Network & Research (SFS)	\$ 8,305	\$ 25,582	\$ 24,418	\$ 274,575
Emergency Meals (Meals on Wheels)	\$ 55,541	\$ 33,247	\$ 58,556	\$ 751,730
MSO Consultant (Meals on Wheels)			\$ 138,435	\$ 138,435
IT Contractor				\$ 298,270
Case Management Training Institute (FSA)	\$ 69,862	\$ 47,638	\$ 55,254	\$ 498,444
IHSS Share of Cost				\$ 93,454
Grand Total	\$ 1,757,093	\$ 1,893,092	\$ 1,940,822	\$ 29,044,422
	FY1314	FY1415	Project to Date	
Total CLF Fund Budget***	\$ 3,832,139	\$ 4,032,139	\$ 30,717,809	
% DAAS Internal of Total CLF Fund**	9.2%	10%	9%	
* 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.				
** 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.				
*** FY14/15 Budget includes \$200K of one-time addback funding for Management Services Organizations project that will be spent outside of CLF, which will not be included in the cost per client.				

Community Living Fund Six-Month Report

CLF @ IOA Purchased Services	Jun-12		Dec-12		Jun-13		Dec-13		Jun-14		Dec-14		Jun-15		Project-to-Date	
	\$	Clients	\$	Clients	\$	Clients	\$	Clients	\$	Clients	\$	Clients	\$	Clients	\$	Clients
Total	\$ 466,195	124	\$ 459,069	120	\$ 509,928	127	\$ 506,193	131	\$ 625,094	149	\$ 640,169	114	\$ 586,054	118	\$ 9,446,196	1,013
Home Care	\$ 145,771	18	\$ 138,095	18	\$ 175,908	18	\$ 213,393	27	\$ 292,821	32	\$ 311,058	27	\$ 235,001	27	\$ 3,867,480	209
Board & Care	\$ 234,489	28	\$ 243,377	27	\$ 223,632	26	\$ 210,304	24	\$ 196,095	22	\$ 242,162	21	\$ 231,153	20	\$ 3,101,233	52
Rental Assistance (General)	\$ 35,348	27	\$ 32,234	30	\$ 33,302	30	\$ 32,215	31	\$ 36,801	36	\$ 25,515	21	\$ 23,417	17	\$ 706,377	319
Non-Medical Home Equipment	\$ 22,130	34	\$ 23,192	31	\$ 21,557	35	\$ 21,705	31	\$ 24,651	40	\$ 15,390	25	\$ 19,684	29	\$ 496,654	600
Housing-Related	\$ 1,882	10	\$ 1,229	8	\$ 1,241	5	\$ 1,300	7	\$ 2,971	7	\$ 592	5	\$ 1,310	2	\$ 262,621	268
Assistive Devices	\$ 4,123	22	\$ 8,321	27	\$ 42,068	19	\$ 9,954	17	\$ 56,029	44	\$ 37,605	22	\$ 69,163	35	\$ 489,771	404
Adult Day Programs	\$ 3,643	1	\$ 711	1	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ 113,494	18
Communication/Translation	\$ 1,134	12	\$ 1,021	11	\$ 1,746	22	\$ 4,189	29	\$ 3,195	22	\$ 3,662	19	\$ 2,453	22	\$ 75,833	252
Respite	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ 43,060	8
Health Care	\$ 1,935	3	\$ 1,495	4	\$ 504	1	\$ 861	3	\$ 779	3	\$ -	0	\$ -	0	\$ 48,344	54
Medical Services	\$ 500	1	\$ -	0	\$ 12	1	\$ 2,028	2	\$ 14	1	\$ -	0	\$ -	0	\$ 40,635	51
Other Special Needs	\$ -	0	\$ -	0	\$ 1,282	3	\$ 1,110	4	\$ 1,037	4	\$ -	0	\$ 41	2	\$ 31,536	83
Counseling	\$ 9,400	19	\$ 6,250	20	\$ 7,169	23	\$ 6,401	24	\$ 9,642	31	\$ 2,950	9	\$ 3,450	8	\$ 79,111	111
Professional Care Assistance	\$ -	0	\$ 1,364	1	\$ -	0	\$ 1,017	1	\$ 120	1	\$ -	0	\$ -	0	\$ 20,418	15
Habilitation	\$ 2,625	1	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ 150	1	\$ 20,388	8
Transportation	\$ 387	7	\$ 761	6	\$ 1,291	7	\$ 1,271	6	\$ 383	6	\$ 508	9	\$ 202	8	\$ 21,737	98
Legal Assistance	\$ 85	1	\$ -	0	\$ -	0	\$ -	1	\$ 100	2	\$ 700	1	\$ 5	1	\$ 6,013	18
Others	\$ 2,745	3	\$ 1,018	1	\$ 216	3	\$ 446	3	\$ 458	4	\$ 27	3	\$ 25	2	\$ 21,493	51

Note: Historical figures may change slightly from report to report. "Other" services have historically included purchases such as employment, recreation, education, food, social reassurance, caregiver training, clothing, furniture, and other one-time purchases.

Client counts reflect unique clients with any transaction of that type.

Homecoming @ SFSC Purchases	Jun-12		Dec-12		Jun-13		Dec-13		Jun-14		Dec-14		Jun-15		Project-to-Date	
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
Total	\$ 10,937		\$ 19,832		\$ 9,389		\$ 10,579		\$ 8,305		\$ 22,245		\$ 21,233		\$ 199,132	
Housing-related services	\$ 4,308	39%	\$ 6,512	33%	\$ -	0%	\$ 829	8%	\$ -	0%	\$ -	0%	\$ -	0%	\$ 74,318	37%
Medical/Dental items & services	\$ 655	6%	\$ 482	2%	\$ 198	2%	\$ 935	9%	\$ 836	10%	\$ 3,136	14%	\$ 8,177	39%	\$ 23,443	12%
In-home support	\$ -	0%	\$ 10,700	54%	\$ -	0%	\$ -	0%	\$ -	0%	\$ -	0%	\$ -	0%	\$ 15,666	8%
Furniture and appliances	\$ 2,541	23%	\$ 906	5%	\$ 3,756	40%	\$ 2,996	28%	\$ 763	9%	\$ 535	2%	\$ 929	4%	\$ 16,949	9%
Food	\$ 246	2%	\$ 50	0%	\$ 100	1%	\$ 725	7%	\$ 950	11%	\$ 1,723	8%	\$ 725	3%	\$ 8,999	5%
Assistive devices	\$ 525	5%	\$ 130	1%	\$ 5,016	53%	\$ 4,804	45%	\$ 4,136	50%	\$ 14,444	65%	\$ 8,039	38%	\$ 40,406	20%
Other goods/services	\$ 2,661	24%	\$ 1,052	5%	\$ 318	3%	\$ 290	3%	\$ 1,621	20%	\$ 2,407	11%	\$ 3,363	16%	\$ 19,351	10%

Community Living Fund Six-Month Report

Active Caseload	Jun-12		Dec-12		Jun-13		Dec-13		Jun-14		Dec-14		Jun-15	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
All Active Cases*	405		467		473		521		526		631		659	
Change from Prior 6 Months	104	34.6%	62	15.3%	6	1.3%	48	10.1%	5	1.0%	105	20.0%	28	4.4%
Change from Previous Year	61	17.7%	166	55.1%	68	16.8%	54	11.6%	53	11.2%	110	21.1%	133	25.3%
Change from 2 Years	(73)	-15.3%	122	35.4%	129	37.5%	220	73.1%	121	29.9%	164	35.1%	186	39.3%
Program Enrollment														
CLF at Institute on Aging	276	68%	284	61%	298	63%	315	60%	302	57%	274	43%	256	39%
with any service purchases	124	45%	120	42%	127	43%	131	42%	149	49%	114	42%	118	46%
needing one-time purchases	7	3%	0	0%	1	0%	0	0%	0	0%	0	0%	0	0%
with no purchases	152	55%	164	58%	171	57%	184	58%	153	51%	160	58%	138	54%
Transitional Care (Homecoming)	50	12%	108	23%	66	14%	100	19%	126	24%	303	48%	357	54%
Emergency Meals at MOW	91	22%	98	21%	117	25%	114	22%	107	20%	62	10%	49	7%
Program to Date														
All CLF Enrollment	1701		1906		2129		2409		2632		3067		3505	
CLF at Institute on Aging Enrollment	1038	61%	1076	56%	1142	54%	1231	51%	1304	50%	1362	44%	1416	40%
with any service purchases	760	73%	789	73%	837	73%	885	72%	937	72%	971	71%	1013	72%
needing one-time purchases	184	18%	184	17%	185	16%	185	15%	185	14%	185	14%	185	13%
with no purchases	278	27%	287	27%	305	27%	346	28%	367	28%	391	29%	403	28%
Average monthly \$/client (all clients, all \$)	\$ 670		\$ 635		\$ 675		\$ 529		\$ 557		\$ 500		\$ 491	
Average monthly purchase of service \$/client for CLF IOA purchase clients	\$ 1,063		\$ 1,088		\$ 1,225		\$ 1,218		\$ 1,295		\$ 1,696		\$ 1,606	
Average monthly purchase of service \$/client for CLF IOA purchase clients, excluding home care, housing subsidies	\$ 116		\$ 107		\$ 184		\$ 120		\$ 208		\$ 160		\$ 264	

*Includes clients enrolled with Institute on Aging, Homecoming, and Emergency Meals.

Community Living Fund Six-Month Report

Referrals	Jun-12		Dec-12		Jun-13		Dec-13		Jun-14		Dec-14		Jun-15	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
New Referrals**	136		117		116		147		142		111		144	
Change from previous six months	9	7%	(19)	-14%	(1)	-1%	31	27%	(5)	-3%	(31)	-22%	33	30%
Change from previous year	35	35%	(10)	-8%	(20)	-15%	30	26%	26	22%	(36)	-24%	2	1%
Status After Initial Screening														
Eligible:	103	76%	89	76%	81	70%	112	76%	94	66%	84	76%	123	85%
<i>Approved to Receive Service</i>	49	48%	56	63%	71	88%	108	96%	69	73%	76	90%	105	85%
<i>Wait List</i>	42	41%	27	30%	0	0%	3	3%	23	24%	7	8%	1	1%
<i>Pending Final Review</i>	12	12%	5	6%	10	12%	1	1%	2	2%	1	1%	15	12%
Ineligible	19	14%	14	12%	13	11%	20	14%	24	17%	12	11%	6	4%
<i>Withdrew Application</i>	14	10%	14	12%	22	19%	8	5%	14	10%	10	9%	10	7%
<i>Pending Initial Determination</i>	0	0%	0	0%	0	0%	0	0%	1	1%	0	0%	4	3%
Program to Date														
Total Referrals	2,592		2,709		2,825		2,972		3,114		3,225		3,369	
Eligible Referrals	1,757	68%	1,846	68%	1,927	68%	2,039	69%	2,133	68%	2,217	69%	2,340	69%
Ineligible Referrals	406	16%	420	16%	433	15%	453	15%	477	15%	489	15%	495	15%

** New Referrals include all referrals received by the DAAS Intake and Screening Unit for CLF services at IOA in the six-month period.

Community Living Fund Six-Month Report

Referral Demographics	Dec-07	Jun-08	Dec-08	Jun-09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12	Dec-12	Jun-13	Dec-13	Jun-14	Dec-14	Jun-15
Age (in years)																
18-59	31%	30%	31%	38%	32%	43%	48%	41%	47%	51%	47%	39%	48%	32%	37%	39%
60-64	13%	10%	11%	13%	13%	14%	11%	17%	12%	10%	14%	17%	17%	21%	18%	15%
65-74	22%	21%	20%	17%	21%	19%	16%	14%	20%	12%	18%	20%	18%	18%	22%	20%
75-84	21%	22%	24%	18%	20%	13%	17%	14%	11%	16%	12%	14%	9%	18%	14%	19%
85+	12%	17%	14%	14%	13%	10%	8%	8%	9%	11%	9%	9%	8%	10%	10%	6%
Unknown	1%	0%	0%	1%	0%	1%	0%	5%	1%	1%	1%	2%	1%	1%	0%	1%
Ethnicity																
White	32%	30%	26%	36%	29%	30%	41%	47%	23%	25%	30%	31%	35%	37%	32%	39%
African American	25%	19%	21%	23%	18%	26%	16%	20%	30%	16%	21%	26%	23%	17%	22%	24%
Latino	14%	19%	15%	14%	13%	12%	15%	13%	14%	8%	9%	9%	12%	15%	15%	17%
Chinese	10%	8%	14%	7%	7%	6%	5%	3%	4%	4%	5%	6%	7%	10%	10%	7%
Filipino	6%	5%	6%	4%	2%	2%	1%	2%	3%	2%	1%	0%	1%	4%	4%	3%
Other API	2%	3%	5%	4%	1%	2%	2%	1%	2%	2%	3%	3%	1%	4%	8%	1%
Other	2%	2%	2%	6%	4%	2%	4%	3%	5%	2%	3%	3%	3%	4%	2%	3%
Unknown	9%	15%	11%	7%	25%	21%	15%	10%	19%	40%	28%	21%	17%	9%	7%	5%
Language																
English	68%	68%	63%	76%	79%	78%	77%	83%	77%	83%	84%	78%	81%	76%	78%	80%
Spanish	11%	15%	13%	10%	9%	11%	12%	8%	12%	8%	7%	8%	10%	11%	10%	12%
Cantonese	7%	5%	9%	5%	6%	7%	3%	2%	6%	4%	4%	7%	6%	7%	8%	7%
Mandarin	1%	2%	2%	3%	1%	1%	0%	0%	0%	1%	1%	1%	1%	2%	0%	0%
Russian	0%	1%	1%	1%	1%	2%	1%	0%	2%	1%	1%	1%	1%	2%	0%	1%
Tagalog	4%	2%	5%	0%	2%	2%	0%	1%	2%	2%	0%	0%	0%	0%	0%	0%
Vietnamese	0%	1%	1%	0%	0%	0%	0%	2%	0%	2%	0%	1%	0%	0%	3%	1%
Other	7%	6%	6%	4%	2%	1%	6%	4%	1%	0%	3%	4%	1%	1%	1%	1%

Community Living Fund Six-Month Report

Referral Demographics (cont.)	Dec-07	Jun-08	Dec-08	Jun-09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12	Dec-12	Jun-13	Dec-13	Jun-14	Dec-14	Jun-15
Zipcode																
94102 Hayes Valley/Tenderloin	11%	8%	10%	9%	10%	9%	12%	11%	10%	13%	8%	36%	9%	17%	14%	13%
94103 South of Market	9%	8%	9%	9%	6%	9%	6%	6%	7%	9%	3%	3%	5%	5%	5%	8%
94107 Potrero Hill	4%	4%	1%	2%	2%	2%	0%	1%	0%	1%	2%	1%	3%	0%	2%	1%
94108 Chinatown	1%	1%	1%	0%	1%	0%	1%	0%	0%	1%	1%	0%	1%	1%	0%	1%
94109 Russian Hill/Nob Hill	10%	8%	9%	10%	10%	7%	10%	9%	5%	7%	6%	4%	3%	7%	7%	5%
94110 Inner Mission/Bernal Heights	11%	12%	12%	11%	7%	5%	6%	3%	4%	4%	10%	4%	5%	6%	7%	4%
94112 Outer Mission/Excelsior/Ingleside	6%	4%	7%	5%	7%	5%	4%	3%	4%	3%	10%	2%	2%	2%	5%	8%
94114 Castro/Noe Valley	2%	2%	2%	2%	2%	3%	2%	5%	0%	1%	1%	1%	1%	1%	0%	2%
94115 Western Addition	5%	7%	8%	5%	6%	5%	4%	7%	9%	5%	3%	3%	4%	4%	3%	6%
94116 Parkside/Forest Hill	5%	11%	12%	17%	12%	26%	25%	21%	23%	21%	34%	21%	23%	18%	23%	26%
94117 Haight/Western Addition/Fillmore	3%	2%	3%	2%	3%	1%	3%	1%	0%	3%	1%	1%	3%	2%	4%	1%
94118 Inner Richmond/Presidio/Laurel	2%	5%	1%	2%	1%	1%	2%	2%	2%	1%	2%	3%	1%	1%	2%	1%
94121 Outer Richmond/Sea Cliff	1%	3%	2%	2%	3%	1%	4%	0%	0%	1%	1%	1%	3%	2%	2%	1%
94122 Sunset	2%	2%	3%	5%	2%	2%	1%	3%	2%	1%	1%	3%	5%	7%	3%	3%
94123 Marina/Cow Hollow	2%	2%	1%	1%	0%	2%	0%	0%	0%	2%	0%	1%	1%	1%	0%	1%
94124 Bayview/Hunters Point	8%	5%	6%	7%	10%	4%	6%	5%	6%	6%	6%	4%	7%	4%	7%	1%
94127 West Portal/St. Francis Wood	1%	2%	1%	1%	1%	1%	0%	0%	0%	0%	1%	0%	0%	1%	1%	0%
94129 Presidio	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
94130 Treasure Island	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	1%
94131 Twin Peaks/Diamond Hts/Glen Park	0%	4%	1%	0%	3%	1%	2%	2%	1%	3%	1%	0%	1%	3%	3%	1%
94132 Stonestown/Lake Merced	2%	2%	1%	1%	1%	4%	0%	3%	2%	1%	0%	0%	3%	2%	1%	2%
94133 North Beach Telegraph Hill	2%	2%	3%	2%	3%	3%	3%	1%	2%	2%	2%	3%	2%	4%	2%	1%
94134 Visitacion Valley	5%	4%	3%	2%	3%	4%	1%	1%	1%	0%	3%	1%	5%	3%	5%	4%
Unknown/Other	7%	3%	4%	5%	6%	7%	5%	14%	23%	13%	5%	7%	15%	9%	5%	7%
Referral Source = Laguna Honda Hospital/TCN	10%	9%	13%	18%	14%	26%	31%	27%	30%	30%	47%	37%	43%	32%	42%	44%

Community Living Fund Six-Month Report

	Dec-07	Jun-08	Dec-08	Jun-09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12	Dec-12	Jun-13	Dec-13	Jun-14	Dec-14	Jun-15
Services Needed at Intake (Self-Reported)																
Case Management	26%	31%	52%	52%	43%	67%	58%	81%	66%	50%	68%	61%	74%	60%	56%	75%
In-Home Support	30%	48%	43%	47%	39%	51%	58%	61%	58%	47%	56%	42%	52%	44%	39%	56%
Housing-related services	23%	13%	27%	41%	22%	34%	49%	38%	40%	34%	32%	28%	35%	35%	25%	43%
Money Management	7%	4%	26%	27%	21%	30%	36%	35%	29%	20%	33%	22%	32%	21%	20%	32%
Assistive Devices	16%	12%	27%	27%	23%	27%	23%	22%	24%	19%	19%	17%	22%	27%	20%	30%
Mental health/Substance Abuse Services	1%	3%	23%	19%	24%	26%	36%	30%	31%	32%	35%	26%	37%	25%	23%	28%
Day Programs	4%	4%	30%	26%	23%	25%	11%	26%	26%	21%	20%	15%	19%	16%	13%	18%
Food	4%	4%	17%	16%	11%	23%	26%	25%	23%	23%	22%	28%	24%	23%	24%	36%
Caregiver Support	2%	3%	15%	23%	18%	17%	23%	18%	19%	10%	15%	10%	12%	15%	14%	15%
Home repairs/Modifications	9%	6%	13%	18%	17%	15%	19%	21%	19%	13%	23%	14%	18%	24%	17%	18%
Other Services	34%	35%	8%	9%	18%	11%	11%	5%	13%	9%	5%	9%	11%	16%	11%	14%
Performance Measures	Dec-07	Jun-08	Dec-08	Jun-09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12	Dec-12	Jun-13	Dec-13	Jun-14	Dec-14	Jun-15
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%	82%	82%	84%			
Clients previously at imminent risk of nursing home placement	76%	76%	76%	74%	82%	82%	80%	82%	81%	83%	80%	82%	83%			
Target	70%	70%	70%	70%	75%	75%	75%	75%	80%	80%	80%	80%	80%			
Percentage of CLF clients who had successfully continued community living for six months or more by the time of disenrollment.	73%	63%	79%	76%	82%	74%	73%	88%	88%	93%	90%	91%	91%			

Client Satisfaction Survey

Telephone Interview and Mail Survey

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Telephone-Administered Questionnaire

Satisfaction Interviewer Survey (SIS)

The first set of questions is about the services you receive through the Institute on Aging.

WORKERS	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
1. How satisfied are you with how often services are provided? <i>(for example: the frequency)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. How satisfied are you with the length of the service visits? <i>(for example: the length of the program)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Overall, how satisfied are you with the QUALITY of the services you have received?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Next I'm going to ask you several questions about how satisfied you are with your Social Worker (or Case Manager) who helps you get services.

WORKERS	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
4. How satisfied are you that your Social Worker has the knowledge and skills needed to help you?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. How satisfied are you with the way your Social Worker treats you?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. How satisfied are you with the way you and your Social Worker communicate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

These next questions have different response options, they are: Yes, To some extent, or No.

	Yes	To some extent	No	I don't know	Refused
7. Overall, would you say that the services you receive meet your needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Do these services help you to maintain or improve your quality of life?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Do these services help you stay in your home?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Would you recommend this program to a friend or family member?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

For these last questions please consider your responses to previous questions when giving your opinion on your overall experience with IOA's services.

OVERALL	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
11. Overall, how satisfied are you with the services you receive?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. Is there anything else you would like us to know about the services you receive?

That was my last question. I want to thank you very much for your participation.

Population Distribution

As of June 15, 2015, 179 clients have been enrolled in the Community Living Fund (CLF) Program. Among interviewed clients, 48% are female (Chart 1); and the average age is approximately 64.8 years old. Data show that women are on average 7 years older than male counterparts (Table 1). The oldest female is 98 and oldest male is 90. The average enrollment length in the CLC program is 2.2 years (Table 2); the longest enrollment currently is eight years.

Gender Distribution (n=58)

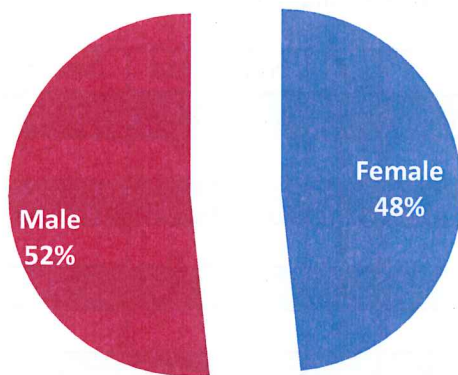


Chart 1 Gender distribution of interviewed clients.

Age	Average	Median
Female	64.8	62.5
Male	57.1	57
Total	60.8	61

Table 1 Average and Median ages of interviewed clients.

Enrollment Length	Average	Median
Female	2.75	1.5
Male	1.7	1.0
Total	2.2	1.0

Table 2 Average and Median enrollment length of interviewed clients.

Response Rate

The entire sample consisted of 178 clients, of which 11 were not reachable due to 'phone not in service' or 'wrong number'. Interviewers called up to 10 times to interview the client. An 11th call was made for two clients at their request of a call back. Thirty-two clients received a maximum of 10 calls. Pending cases include language barriers, requested mail survey, or refusals. Chart 2 shows the distribution of calls across 178 CLF clients. In total, 708 calls

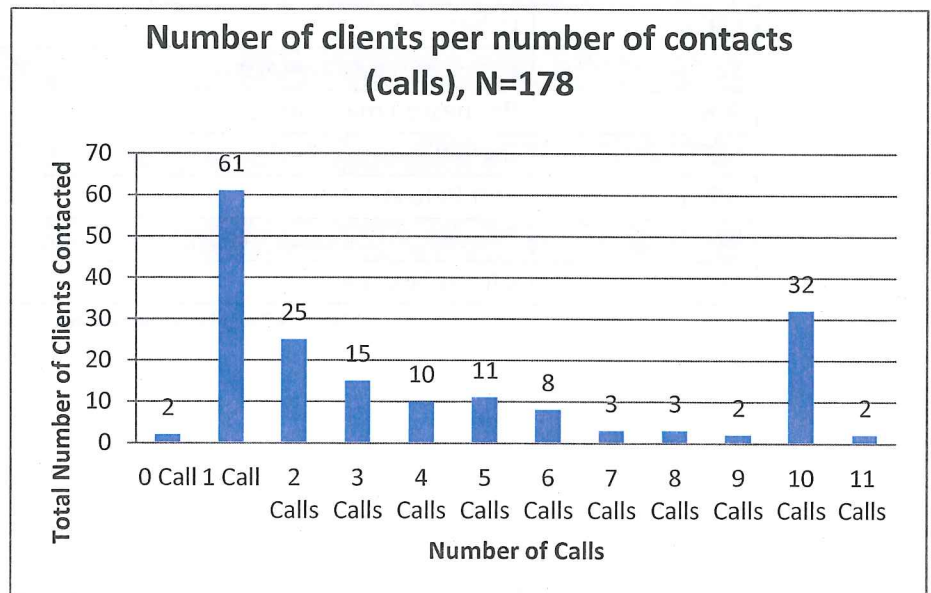


Chart 2 Number of clients per number of contacts (calls)

were made. Thirty-four percent of clients (or 61 clients) were been contacted one time and another 34% were contacted five or more times. Altogether, 58 clients were successfully interviewed. Nineteen clients were successfully interviewed on the first call attempt, while 10 were completed after five or more calls.

The response rate has been calculated using the total sum of completed interviews as the numerator and non-interviewed eligible Respondents as the denominator. The following cases were excluded from the denominator: language barriers, wrong number, disconnected, business/commercial, illness, death, and no number. The table below shows the numerator and denominator coded cases used to calculate the response rate. The overall response rate, as of July 25, 2015 is 74%. The response rate is anticipated to increase as all pending cases will be re-contacted through a mail survey. Language barrier cases will also receive a translated survey via mail. The survey has been translated to Russian, Spanish, and Cantonese.

Code	Outcome code	f	Numerator	Denominator
AM	Answering Machine or Voicemail	5		√
BUS	Business/Commercial	7		
DISC	Disconnected	5		
FAX	Facsimile	2		
HCB	Hard callback	1		√
HREF	Hard Refusal	5		√
I	Interview complete	58	√	√
INC	Interview Incomplete	2	√	√
LB	Language Barrier	18		
MAX	Reached maximum # of calls	32		
NIS	Not in Service	6		
NN	No number (missing phone number)	2		
NS	No services for a long time	3		
OTH	Other	9		
PNS	Program has NOT started	1		
RMS	Requested mail survey	5		√
SCB	Soft Callback	1		√
SREF	Soft Refusal	4		√
TS	Too sick to speak on the phone	6		
WN	Wrong Number	5		

Table 1 Telephone survey outcome code results.

Survey Results

Survey results show generally positive findings- the majority of clients are satisfied with services, their social workers, and overall services. This analysis combined Very satisfied and satisfied into one category, and Dissatisfied and Very Dissatisfied into another category.

Services

Eighty percent of clients reported being satisfied with their services. The overall satisfaction with the quality of services was greater than 80% and no client reported being dissatisfied. In terms of frequency of services and overall quality of services, there was a higher satisfaction level, for instance 45% reported as very satisfied and 48% satisfied. Only four clients responded negatively about the timeliness of services. One Respondent expressed that it was easier to get things done, however, that it had changed a few months ago. Another mentioned that it is difficult to get things done, but overall, they are satisfied.

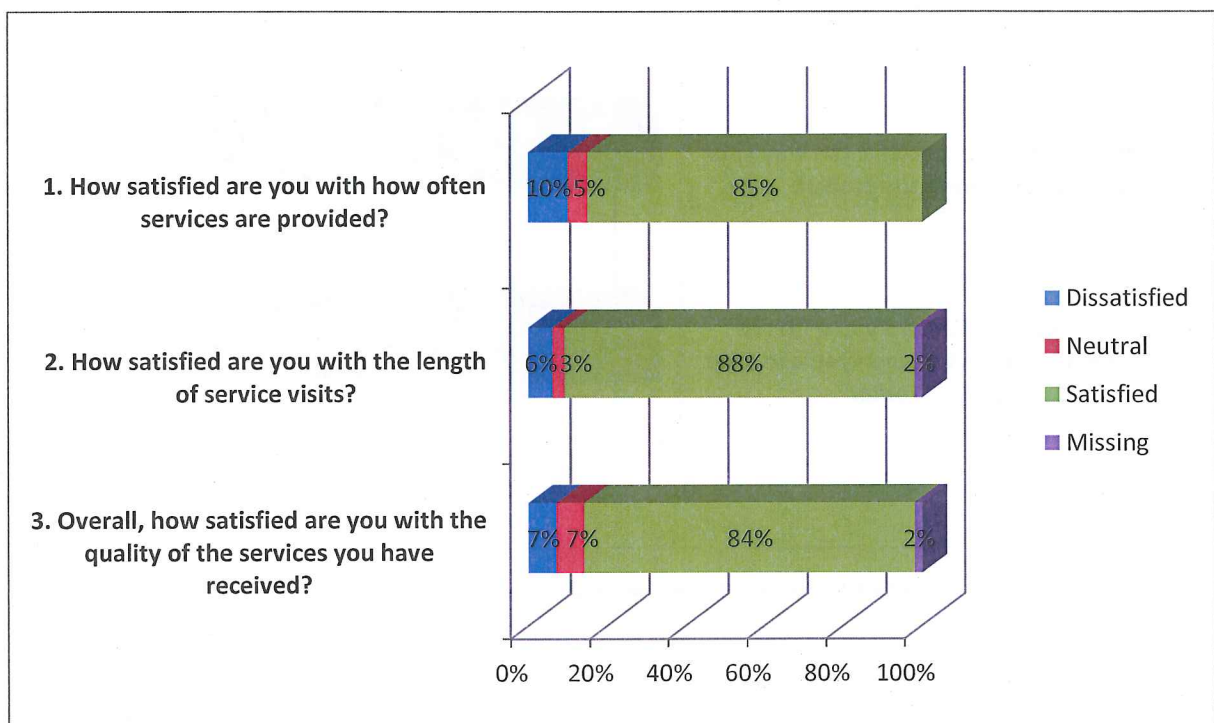


Chart 3 Client satisfaction pertaining to services received.

Workers

Overall, there is an average 80% client satisfaction level with clients' Social Worker which includes perception of their Social Worker's knowledge, treatment, and communication. There is less than 10% dissatisfaction and/or neutral response for each question. In general, there is a higher very satisfied response rate pertaining to Social Worker's knowledge, treatment, and communication- 53%, 60%, and 57% respectively. One client reported that (s)he had multiple social workers and could not rate his/her satisfaction with the Social Worker.

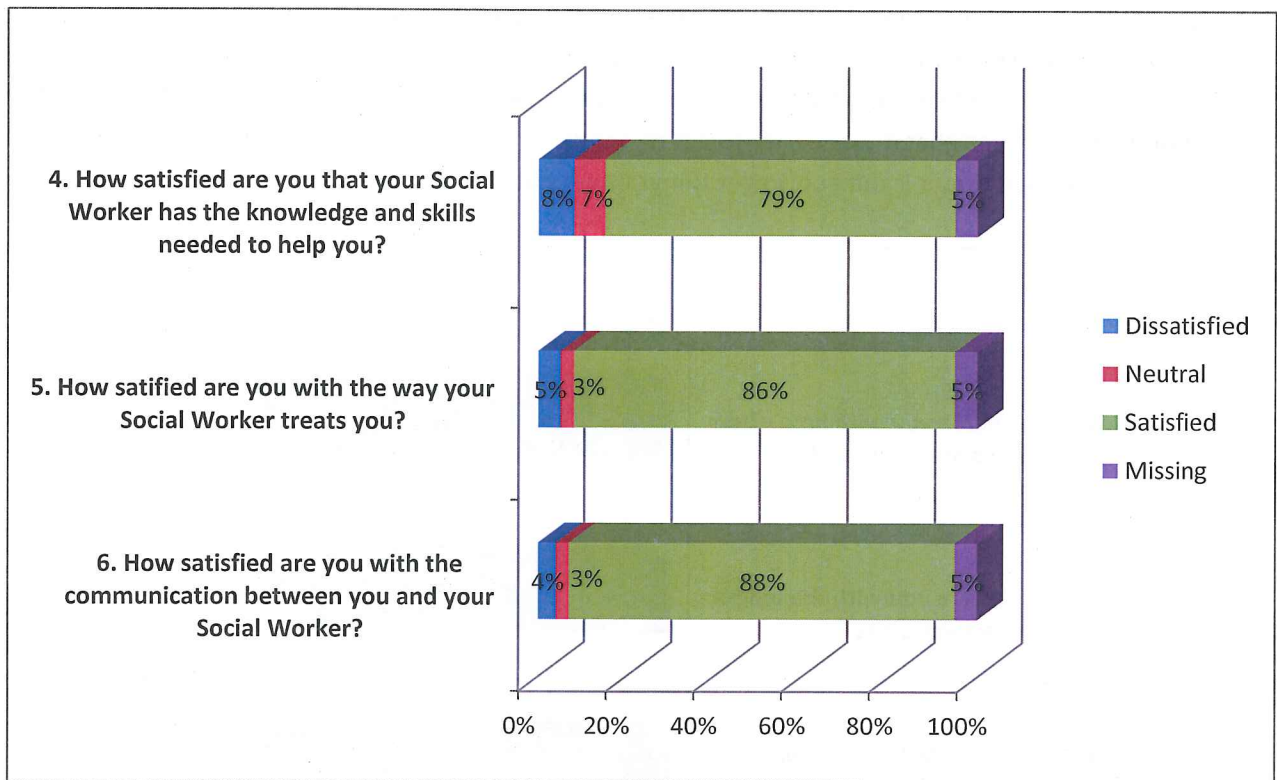


Chart 4 Client satisfaction pertaining to their Social Worker.

Service Impact

More than 60% of clients selected “to some extent” when asked about the impact of the services they are receiving. Only less than 10% per category of clients responded that they are not positively impacted by the services that they are receiving. The Other category includes refused, N/A and or missing data. At least half of the clients (30 clients) have been enrolled in the program a year or less and responded that they cannot give an accurate response to the impact of the services that they are receiving.

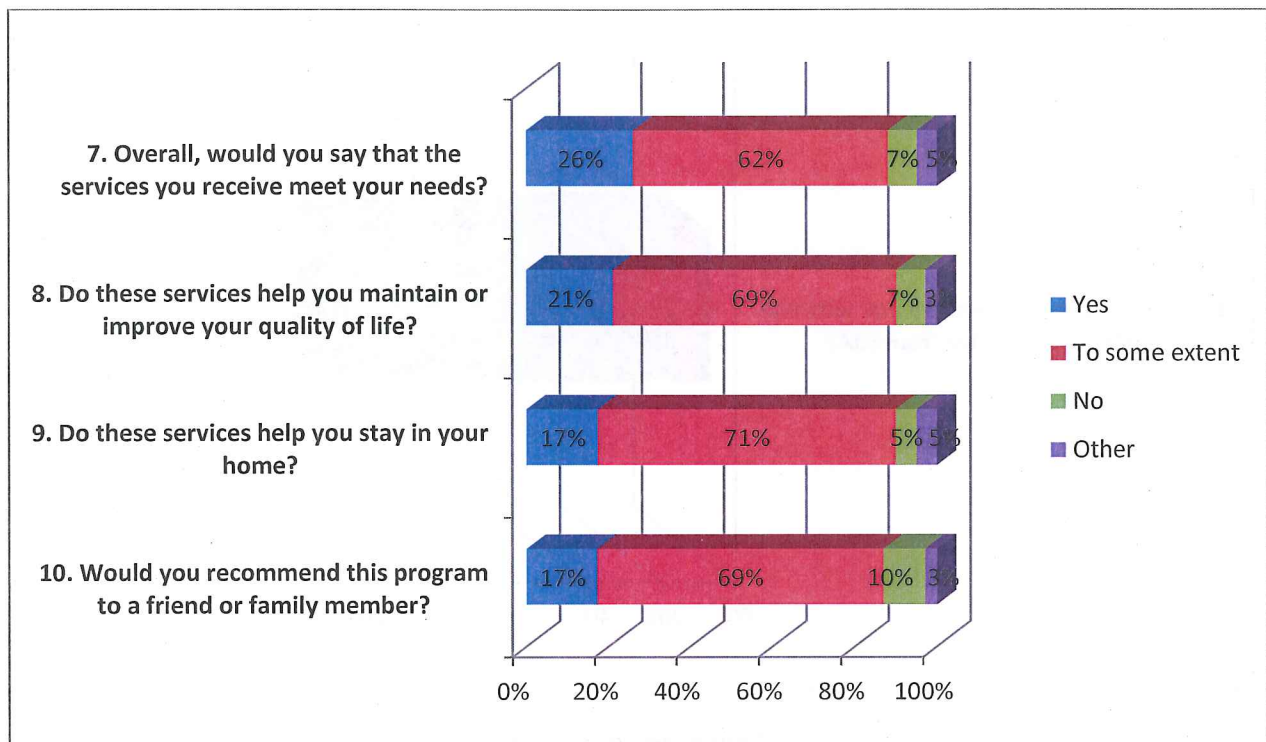


Chart 5 Client satisfaction pertaining to service impact.

Overall Satisfaction

Overall, 85% of clients are satisfied with the services that are provided; 47% (27 clients) of clients are very satisfied and only 2% (1 client) is very dissatisfied. The 'Other' category includes three clients missing data and one client refused to respond.

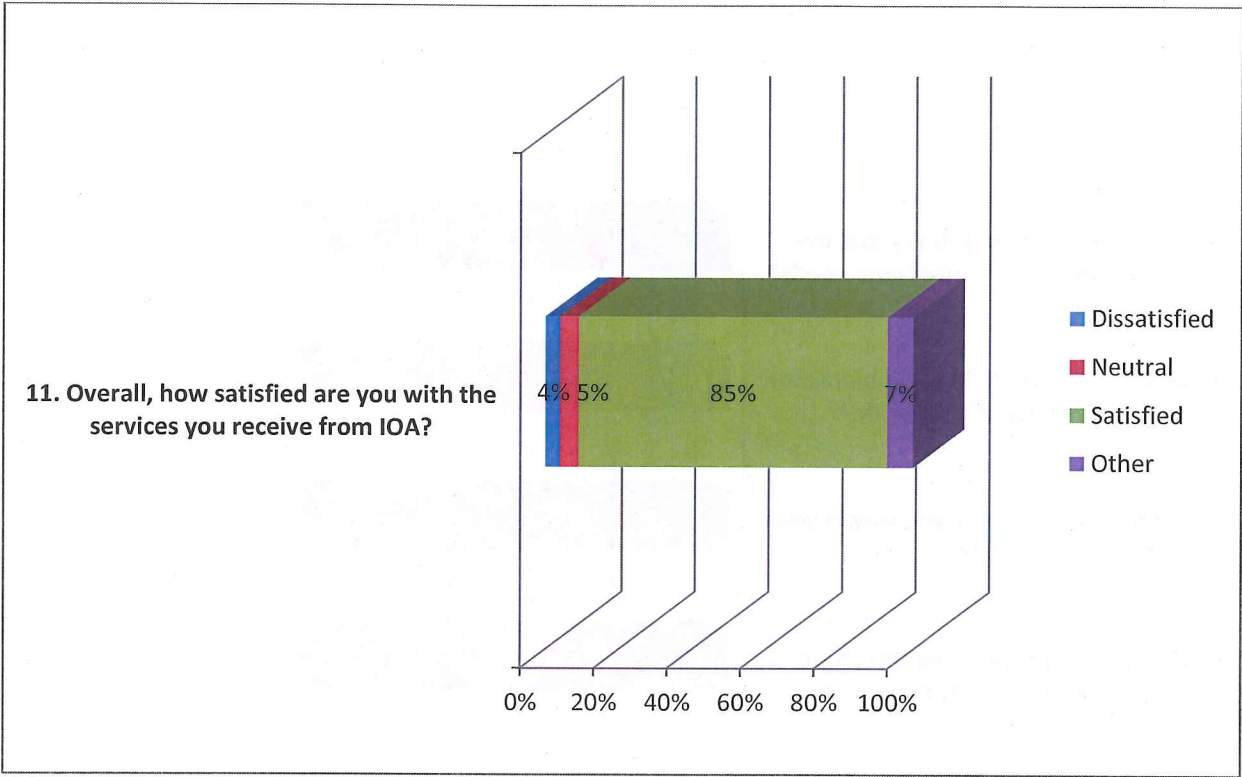


Chart 6 Client overall satisfaction.

Qualitative Data

Overall, there are a substantial amount of positive additional comments compared to negative; more than half of the comments showed a positive satisfaction perception towards IOA.

Highlights of additional comments by clients:

“Extremely grateful. Loves Social Worker.”

“Very Satisfied though often lack communication with Social Worker.”

“It had been a good relationship with my Social Worker, treats me like a princess.”

“Very satisfied with IOA.”

Theme	Positive	Negative
Social Worker	3	3
Housing		2
IOA	18	1
Timeliness of Services		4
Improved life	1	
Convenience	1	
Total	33	

Table 2 Client's additional comments overall theme.

Two negative comments pertained to housing. One client mentioned that they live in a group home and personal belongings often go missing and the other client does not like their current living situation because she would like to move back to Sacramento to be closer to her family.