



# Synopsis: Survey of Case Management Services for Older Adults in Dane County

January 1, 2021 – August 31, 2021

## About the Case Management Program

### Background

Through contracts with purchase of service (POS) agencies, Dane County Area Agency on Aging (AAA) provides publicly-funded case management services for older adults on behalf of Dane County Department of Human Services (DCDHS). Case management services in Dane County are provided through a network of 12 geographically-based Senior Focal Points.

### Primary Goal of Case Management

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

### Funding Case Management in Dane County

Case management services are funded primarily with General Purpose Revenue (GPR). In 2021, Dane County GPR accounted for 48% of the total funds needed for this program. Additional financial support from cities, municipalities, townships, villages, and donations is vital in providing services through the 12 Senior Focal Points.

### Program Eligibility

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

## About the 2021 AAA Case Management Survey

### Purpose

The primary purpose of this survey is to measure client satisfaction of case management services with the goal of improving program efficiency and ensuring the program is effectively helping clients.

### Evaluating Case Management Services

The survey is based on the mail version of the Case Management Survey of the Administration on Aging, Performance Outcome Measures Project (POMP). That instrument, developed in 2002 and updated as needed, is used nationally to evaluate case management program performance.

The survey examines services provided, client satisfaction with the services and their case manager, how those services have helped the client, and opportunities for improvement. Edits were made in 2021 to ensure we collected feedback from individuals knowledgeable about the services provided in the last year.

### Translation

Surveys were not translated in 2021, because no Spanish surveys were completed in 2019 and additional translation into Hmong was needed. Rather than mail a translated survey, English surveys were sent to the case manager who was to work with their client to complete the survey in the client's preferred language. In all, 54 surveys were sent to case managers (49 with Spanish-speaking clients and 6 with Hmong-speaking clients). Ultimately, two of these surveys were returned from Hmong-speaking clients.

## Survey Population and Eligibility

The survey population was all clients who received case management services, not just Medicare Part D Plan Finders and enrollment, between January 1, 2021 and August 31, 2021. From the population we identified eligible records – those who are not deceased, have a case manager, can be reached, and who are not being served by another type of program, in a facility, or deemed incapable. The population whittled down from 2,610 people to 2,157 eligible records. A random sample of 1,500 people, proportionate by race/ethnicity and Senior Focal Point, were invited to complete the survey. Black, Indigenous, and People of Color (BIPOC) are often underrepresented in survey results, so we over sampled this group and sent 87 additional surveys to people who identify as BIPOC.

## Survey Methodology

To increase response rate a pre-notification letter was sent on October 20, 2021 to the randomly selected clients and BIPOC oversample (1,587 people). The letter arrived in their respective Senior Focal Point envelope and explained they would receive a survey soon and to please complete it. Those that had email addresses were sent an email on October 26, 2021 inviting them to complete the survey online (8 did, for a 10% response rate). Then non-respondents and everyone else were mailed a survey on November 4, 2021. The mail survey included a postage-paid, self-addressed return envelope. Respondents were asked to return their survey by December 20, 2021. Surveys were accepted until January 18, 2022.

## Survey Validity

Five hundred sixty (560) surveys were returned and 405 were analyzed – respondents who do not recall interaction with their case manager in the last year, are not the most knowledge person about services received, or did not mark services received/only marked that they got help with Medicare Part D were excluded. The 405 responses still resulted in a strong response rate (29.8%), an acceptable margin of error ( $\pm 4.48\%$ ), and good representation of the population. For these reasons, all 405 surveys are included in the analysis.

## Survey Results

### Generally, clients are very satisfied with case management services and their case manager

Similar to 2019<sup>1</sup>, nearly 90% or more gave the most favorable ratings to almost all of the statements on the survey

- 89% (87%) rated the overall quality of case management services “excellent” or “very good” – only 10 (3%) (7%) rated it “fair” or “poor,” while the rest rated it “good”
- 99% (96%) say, “yes,” their case manager treats them with respect
- 96% (94%) say, “yes,” their case manager explains services in a way they can understand
- 96% (94%) know how to contact their case manager
- 95% (94%) can select the services they receive
- 93% (89%) say, “yes,” their case manager returns their phone call in a timely manner
- 91% (87%) say, “yes,” their case manager involves them in discussing and planning their services
- 89% (89%) say, “yes,” they and their case manager work together to decide what services they need

### However, there are some areas for growth

Communication is very important to clients. Case management should strive to continuously improve. Staying in contact and consistency with service plans are two areas for specific effort.

- 15% of returned surveys (89 clients) do not remember interacting with their case manager in the last year
  - Statistically significant differences by Senior Focal Point exist with Sugar River Senior Center, Southwest Dane Senior Outreach, and NewBridge Madison having relatively high lack of recall.
- When asked what would improve services, 28% (7) talked about better communication or calling more frequently (32 asked for more frequent contact in 2019). Conversely, in a different space, 12 praise their case manager for keeping in touch.
- Focusing on consistency around the service plan is encouraged. Only 59% (45%) of respondents remember a plan being developed and 47% remember being offered a copy. COVID may be a factor as case managers do not have easy access to a printer to give their clients a copy of the plan.

<sup>1</sup> Where comparison can be made, 2019 results are shown in parentheses and colored light orange (x%)