



Survey of Case Management Services for Older Adults in Dane County

January 1, 2014 – August 31, 2014



January 2015

Introduction

I. Background

Through contracts with purchase of service (POS) agencies, Dane County Department of Human Services provides publicly-funded case management services for older adults.

Case management is defined as, “The provision of services by providers whose responsibility is to enable clients and when appropriate clients’ families to gain access to and receive a full range of appropriate services in a planned, coordinated, efficient, and effective manner. Case managers are responsible for locating, managing, coordinating, and monitoring all services and informal community supports needed by clients and their families. Services may include, but are not limited to, assessment; case planning, monitoring and review; advocacy; and referral.”¹

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, information and referral, and the coordination of a variety of services – from home chore and personal care to assistance with health insurance and prescription drug plans.

Case management services in Dane County are provided through a network of 15 geographically-based senior focal points.

Case management services are funded primarily with General Purpose Revenue (GPR). A small amount of 2014 funding (\$4,500) came from State Health Insurance Program (SHIP) funds which are federal dollars from the Centers for Medicare and Medicaid Services (CMS), passed through the State (WDHS) to counties to provide outreach to low-income older adults for assistance with issues involving Medicare/Medicaid, enrollment in assistance programs to help off-set the cost of Medicare premiums (like LIS – Low Income Subsidy or Extra Help) and any other

¹ *Standard Program Categories*, Department of Health Services (Madison, Wisconsin, 2013), p. 15 available on-line at: <http://www.dhs.wisconsin.gov/hsrs/docs/SPCDEFINITIONS.pdf>

issue related to Medicare. In Dane County, these dollars are used to provide this outreach through four of the senior focal point case management programs.

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

One of the requirements in the 2014 contracts with purchase of service agencies has been for “case management staff to distribute a satisfaction survey annually for Client-Centered Case Management clients to complete. Results/findings of the survey will be provided to the Area Agency on Aging by January 15, 2015.”

Recognizing the diversity of the surveys and the difficulties in comparing the programs, the 2014 AAA Access Committee Work Plan – QTR 2, benchmark called for, “if appropriate, draft 2014 survey to be used by all Focal Points by 30 November.”²

II. Study Purpose

The purpose of the survey was to measure client satisfaction of case management services with the goal of using this input “in order to improve program efficiency and ensure the program is effectively helping senior adults” (p.4).

III. Data Collection

Measures

The mail version of the Case Management Survey of the Administration on Aging, Performance Outcome Measures Project (POMP), available at: http://www.aoa.acl.gov/Program_Results/POMP/CaseManagement.aspx, served as the base instrument. This instrument, developed beginning in 2002, has been used in looking at performance nationally. Using it for this study allowed for comparison to national and regional data available at <http://www.agid.acl.gov/>.

The Case Management Survey examines the service that has been provided, the recipient’s satisfaction with those services, and the ways that the service has been helpful.

² AAA Access Committee, *2014 AAA Access Committee Work Plan-QTR2 Revised & Approved by AAA Access Committee 3/11/14*, (Madison, Wisconsin, 2014), p.4.

The survey was reviewed by Directors from three senior focal points – City of Middleton Senior Center, North/Eastside Senior Coalition, Village of Waunakee Senior Center - and the AAA Manager over the course of two meetings – August 22 and September 8, 2014, and revisions were suggested to make it more user-friendly for Dane County.

Decisions were made to:

- Revise the introduction to include the name of the program and the case manager.
- Delete questions about the length of time the individual received case management services as that information was already available in the DCDHS Information System.
- Move the listing of services received to the first question and place the choices in alphabetical order.
- Add in a space for comments about the case manager.
- Narrow the possible responses in the grid regarding returning phone calls, etc. to Always, Sometimes, Never from Always, Usually, Sometimes, Rarely, and Never.
- Move the overall quality rating to the end of the survey.
- Add in a space for overall comments.

The final survey was 18 items. It may be found in Appendix A.

Translation

The survey was made available in Spanish. The revised base survey was redesigned so that the form had both the English and Spanish versions side-by-side. The survey was translated into Spanish first using Bing Translator. Nestor Silva and Marcos Rivas, Information and Assistance Specialists with the Aging and Disability Resource Center (ADRC) of Dane County, provided the final edits. Our gratitude is extended to both of these individuals for their assistance.

The North/Eastside Senior Coalition (NESCO), which holds a contract for bilingual case management services for Dane County seniors, identified their clients who were to receive the Spanish/English version of the survey. A total of 44 Spanish/English versions of the surveys were mailed.

Survey Population

A query in InfoMaker was used by the Senior Program Analyst in the Planning and Evaluation Unit with DCDHS to pull a listing of all clients in the DCDHS Information System who received case management services between January 1, 2014, and August 21, 2014, and who were reported into the DCHS Information System. This was generated on August 22, 2014, as an Excel spreadsheet. This was unduplicated by program, then by client recognizing that clients may have received case management services from more than one agency during the study period.

The next step was to ensure that an accurate list of clients and their addresses was developed and that case managers and agencies were appropriately identified. Lists of clients were sorted by the agency that provided services. These were sent August 24, 2014, to Cheryl Batterman, AAA Manager, for distribution to agencies along with instructions to:

- Record the name of the case manager with which the person is most familiar. This is to be in a first name then last name format so that it will read Jane Doe (for example) when the mail merge is done.
- Review the address shown for each client and make any needed revisions directly on the spreadsheet.
- Add any missing addresses to the spreadsheet.
- If there are any missing clients, please add them to the spreadsheet.
- If anyone is deceased, please record the date of death (as close to the date as possible) so that the individual is not inadvertently sent a survey.
- Return the completed spreadsheets no later than Noon on Wednesday, September 17.

Agencies were also asked to indicate if the survey should be directed to a guardian, rather than the individual, and to provide the appropriate mailing address.

All spreadsheets were returned on or by the September 17 deadline.

The data from the spreadsheets was updated into a “master” spreadsheet that was “cleaned.” Agencies that dropped a client from the originally sent spreadsheet were asked to “justify” the reason for doing so. For persons who received services from more than one agency during the study period, the following decisions were made:

- Send a survey for the service that was currently opened.
- If the services were all closed, send a survey for the agency last from which services were received.
- If the services were all open, then send surveys for both agencies.

In some instances, a client may have been opened more than once to a single agency – such as when the client may have withdrawn from a service and then decided to request services at a later date. A single survey was sent with the name of the most recent case manager.

Of the original 2,106 rows of clients, 335 were cut, most frequently due to the person having passed away. Other reasons are cited in Table 1.

Table 1: Case Management Survey – Reason Rows of Clients were Not Included in Survey Mailing

Reason	Number	Percent
Deceased	114	34.0
No valid address	72	21.5
Moved	52	15.5
Duplicates	49	14.6
Moved to a Nursing Home	15	4.5
Care WI clients	6	1.8
No case manager identified	5	1.5
Not appropriate per case manager	5	1.5
No mail or does not want to receive mail	3	0.9
Homeless	3	0.9
Unknown client	2	0.6
Other Reasons (incarcerated, no contact in 2014, client does not wish to be contacted, moved to group home or assisted living, etc.)	9	2.7
Total	335	100.0

Survey Method

A total of 1,771 surveys were mailed October 1 – 6, 2014. Envelopes were stuffed by Bonnie Wahrer, a limited term employee (LTE), brought in to assist with this mailing.

Surveys were sent out in DCDHS Department envelopes. A postage-paid, self-addressed return envelope was included.

Surveys returned with bad addresses, that had a forwarding address indicated, were re-mailed up until two weeks prior to the final survey due date. The exception was if a mailing address was outside of Dane County, the survey was not re-mailed. Of the 204 surveys were returned with bad addresses, 84 were re-mailed.

Table 2 : Surveys by Disposition by Agency

Agency	Pulled	Rows Cut	Mailed	Returned with Bad Addresses Not Re-mailed	Surveys to Clients
C. of Fitchburg	115	17	98	4	94
C. of Middleton	77	6	71	1	70
C. of Stoughton	141	32	109	8	101
Colonial Club, Inc.	142	20	122	8	114
DeForest	68	5	63	2	61
East Madison/Monona	181	15	165	11	154
North/Eastside (NESCO)	202	51	155	7	148
Northwest Dane	104	7	97	11	86
Senior Citizens of Belleville, Exeter, etc.	67	4	63	4	59
South Madison	419	85	331	42	289
V. of McFarland	37	8	29	3	26
V. of Mount Horeb	70	6	64	2	62
V. of Oregon	91	25	66	3	63
V. of Waunakee	166	23	143	2	141
West Madison	226	31	195	12	183
Total	2,106	335	1,771	120	1,651

Client Confidentiality

Potential respondents were assured of their confidentiality, but not their anonymity – since by having their name and address, their identity was known for mailing purposes. Survey results were kept separate from any service records. Information from the surveys is being released in aggregate form.

Each survey had a 4-6 digit tracking number associated with it that was linked with the demographics of the potential respondent. This was to assist with any second mailings, to keep from asking clients information already known to the Department, and to reduce the length of the survey.

Response Rate

The overall response rate was 38.8%; a response rate of 20% is considered acceptable for a one-time mail survey. There was considerable variation by agency as seen in Table 3.

Table 3 : Response Rate by Agency

Agency	Surveys to Clients	Surveys Returned	Surveys Excluded	Useable Surveys	Response Rate
C. of Fitchburg	94	31	1	30	32%
C. of Middleton	70	32	1	31	44%
C. of Stoughton	101	47	1	46	46%
Colonial Club	114	54	3	49	43%
De Forest	61	36	1	35	57%
East Madison/Monona	154	52	8	44	29%
North/Eastside (NESCO)	148	51	3	48	32%
Northwest Dane	86	35	0	35	41%
Senior Citizens of Belleville, etc.	59	31	0	31	53%
South Madison	289	100	5	95	33%
V. of Mc Farland	26	15	0	15	58%
V. of Mount Horeb	62	38	2	36	58%
V. of Oregon	63	27	0	27	43%
V. of Waunakee	141	80	1	79	56%
West Madison	183	47	10	37	20%
Total	1,651	676	36	640	39%

Sample of Comments From Surveys That Were Excluded

I don't know my case manager or have her or his telephone number.

We met with her two (2) times. Because we are not in need of any services at this time - we have been placed in the inactive file.

I'm not aware that a "case manager" was assigned to me or my wife.

We don't use any services presently. However, we may in the future.

Does this person even exist?

I don't have a case manager or services.

(Name of Case Manager on survey) and I met at Perkins for coffee. She was friendly & nice to talk to - but I can't really fill out your survey because no real services took place. I'm sorry to not be able to help you with your program.

Sorry, don't know how to answer these questions as receive no help with anything.

(Name of Case Manager on survey) sent me a letter of introduction and I see her at the supper & support meeting, but she has not called or set up a time to come to our home.

The 36 surveys, shown in Table 3, excluded for analysis included those that were returned blank (3); those on which the respondent indicated that no services had been received (27); and those on which the respondent indicated that they received an ancillary service but had not used case management services for some time (6).

The response rate for the English/Spanish surveys was 27% with 12 of the 44 surveys returned.

IV. Findings

Data was analyzed by the Senior Program Analyst in the Planning and Evaluation Unit of Dane County Department of Human Services.

Findings are presented in the following sections of the report:

- Demographics
- Services Coordinated
- Participation in service planning
- Service Quality
- Overall Quality
- Benefits
- Recommendations for improvement
- Results by contracted agency

V. Limitations

There are a number of limitations that are inherent in a study of this nature:

- The study was conducted by staff from the Planning and Evaluation Unit with the Dane County Department of Human Services rather than an independent third party.
- All useable surveys returned by December 2, 2014, were included in the data analysis rather than a stratified sample or a sampling of surveys based on the percent of clients served.

- Due to the number of questions that were missed either by being skipped or by omitting a page, it was decided to analyze the data based on the number of respondents for each question rather than using the total number of survey respondents which is the preferred methodology.

VI. Future Studies

Suggestions for future studies include:

- In the list of services to be coordinated, add in Medicare Part D to the list for Medicare/Medicaid.
- In the list of services to be coordinated, shorten the spacing between the checkboxes to help respondents and data entry staff select the intended box.
- Add durable medical equipment, i.e., wheelchairs, walkers, etc. to the list of services that the case manager helps to coordinate.
- Add “Not Applicable” to the series of questions on the quality of services, i.e., returning phone calls in a timely manner or doing a good job of setting up services, given that some respondents indicated they did not call their case manager nor did the case manager set up services for them.
- Add in two questions regarding whether the person completed the survey on his/her own or if someone assisted him/her and the relationship of that person to the intended respondent.
- For Q. 16 regarding whether case management services help the individual to continue to live at home – add in or apartment – or otherwise revise the question to get at the ability to live independently in the community.
- Consider adding more checkboxes rather than open-ended questions for ease of use by persons with arthritis or other conditions limiting their ability to write free-form text.

VII. Next Steps

This information will be shared with:

- DCDHS staff and managers
- Senior focal points
- Area Agency on Aging (AAA) – Access Committee
- Area Agency on Aging Board
- Health and Human Needs Committee (HHNC) of the County Board
- General public via posting on the AAA web site.

Additionally,

- It is recommended that follow-up be conducted with West Madison Senior Coalition, Inc., which had the lowest response rate and the greatest number of surveys that were excluded, to determine the methodology used for identifying individuals as clients.
- Discussion will be held and corrective plans will be developed as needed with senior focal points with scores less than the mean.
- Comments attributable to individual senior focal points will be shared with them.
- The survey instrument will be revised to address issues raised in the section of this report on future studies.

Demographics

During the period of January 1, 2014, through August 21, 2014, 2,045 unduplicated clients received 2,107 Dane County funded case management services. A total of 1,771 surveys were mailed to 1,768 unduplicated persons. Individuals who were reported as “open” with more than one agency at the time of the survey were sent survey questionnaires for each agency; 639 individuals returned them, with one returning two – one each for two different agencies.

Respondents to the survey were not representative of the population served. There were statistical differences in terms of gender, race, and age between the survey respondents and persons who received services within the study’s time period.

Respondents, as shown in Table 4, were more likely to be female (73% versus 68%)³ and less likely to be persons of color (7% vs 11%)⁴ compared with unduplicated persons served during the study time period. They were also nearly one year older. The average age of respondents was 78.5 compared with 77.7 for persons

Table 4: Demographics of Survey Respondents Compared with Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Characteristic	Clients Served		Surveys Mailed		Respondents	
	No.	Percent	No.	Percent	No.	Percent
Gender						
Female	1,399	68	1,223	69	466	73
Male	646	32	545	31	172	27
Unknown					1	<1
Total	2,045	100	1,768	100	639	100
Race/Ethnicity						
Asian	26	1	23	1	6	1
Af. Amer/Black	130	6	115	7	23	4
Bi-Racial	3	<1	3	<1	1	<1
Hispanic/Latino	69	3	60	3	14	2
Native American	1	<1	0	0	0	0
Pacific Islander	3	<1	3	<1	2	<1
White	1,783	87	1,539	87	584	91
Unknown	30	1	25	1	9	1
Total	2,045	100	1,768	100	639	100
Age at Survey						
30-34	1	<1	0	0	0	0
50-54	9	<1	9	1	1	<1
55-59	19	1	18	1	4	1
60-64	184	9	170	10	50	8
65-69	318	16	285	16	101	16
70-74	291	14	259	15	90	14
75-79	292	14	250	14	90	14
80-84	340	17	292	17	110	17
85-89	330	16	278	16	116	18
90-94	197	10	156	9	56	9

³ $\chi^2=9.17, df=1, p<.10$.

⁴ $\chi^2=22.54, df=7, p<.10$

reported receiving services during the study time period.

Respondents ranged in age from 54 to 111. It should be noted that this service is officially to serve persons age 60 and older.

Agencies that had response rates higher than the overall response rate of 38.8% as shown in Table 3 will be over-represented in the analysis. While those, with lower response rates, such as West Madison Senior Coalition and East Madison/Monona Coalition of the Aging, will be under-represented.

Table 4: Demographics of Survey Respondents Compared with Clients Served and with Surveys Mailed (All Unduplicated)

Characteristic	Clients Served		Surveys Mailed		Respondents	
	No.	Percent	No.	Percent	No.	Percent
95-99	50	2	38	2	13	2
100-104	11	1	10	1	5	1
105-109	1	<1	1	<1	1	<1
110-114	1	<1	1	<1	1	<1
Unknown	1	<1	1	<1	1	<1
Total	2,045	100 ⁵	1,768	102 ⁶	639	100

⁵ Will not equal 100% due to rounding.

⁶ Will not equal 100% due to rounding.

Municipalities

Clients who received case management services between January 1, 2014, and August 21, 2014, hailed from nearly every municipality in Dane County. Just three of the 61 municipalities in the County were not represented: the City of Edgerton, a portion of which is in Dane County; the Town of Christiana; and the Village of Rockdale.

Respondents to the survey were more likely to hail from towns and villages than from the cities that comprise the County.

The City of Madison, driven in part by the low response rate from the West Madison Senior Center, which comprised 36% of the surveys mailed and 31% of the population served, was under-represented in the respondents to the survey at 26%.

The Villages of DeForest, Mount Horeb, and Waunakee were slightly over-represented in respondents compared to the number of clients served and surveys mailed.

Table 5: Municipalities of Survey Respondents Compared with Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Municipality	Clients Served		Surveys Mailed		Respondents	
	No.	Percent	No.	Percent	No.	Percent
Cities	1097	54	1097	62	327	51
Fitchburg	123	6	123	7	33	5
Madison	637	31	637	36	169	26
Middleton	74	4	74	4	32	5
Monona	68	3	68	4	15	2
Stoughton	106	5	106	6	46	7
Sun Prairie	77	4	77	4	28	4
Verona	12	1	12	1	4	1
Towns	234	11	234	13	101	16
Albion	3	<1	3	<1	1	<1
Berry	6	<1	6	<1	3	<1
Black Earth	2	<1	2	<1	1	<1
Blooming Grove	5	<1	5	<1	1	<1
Blue Mounds	5	<1	5	<1	0	0
Bristol	9	<1	9	<1	5	1
Burke	2	<1	2	<1	2	<1
Cottage Grove	6	<1	6	<1	3	<1
Cross Plains	13	1	13	1	4	1
Dane	5	<1	5	<1	3	<1
Deerfield	4	<1	4	<1	3	<1
Dunkirk	10	<1	10	1	1	<1
Dunn	5	<1	5	<1	2	<1
Madison	19	1	19	1	8	1
Mazomanie	11	1	11	1	4	1
Medina	2	<1	2	<1	1	<1
Middleton	2	<1	2	<1	2	<1

Table 5: Municipalities of Survey Respondents Compared with Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Municipality	Clients Served		Surveys Mailed		Respondents	
	No.	Percent	No.	Percent	No.	Percent
Towns						
Montrose	8	<1	8	<1	4	1
Oregon	10	<1	10	1	5	1
Perry	1	<1	1	<1	0	0
Pleasant Springs	1	<1	1	<1	1	<1
Primrose	4	<1	4	<1	2	<1
Roxbury	4	<1	4	<1	1	<1
Rutland	2	<1	2	<1	1	<1
Springdale	4	<1	4	<1	2	<1
Springfield	6	<1	6	<1	5	1
Sun Prairie	7	<1	7	<1	1	<1
Vermont	4	<1	4	<1	1	<1
Verona	13	1	13	1	9	1
Vienna	6	<1	6	<1	3	<1
Westport	38	2	38	2	17	3
Windsor	16	1	16	1	5	1
York	1	<1	1	<1	0	0
Villages	405	20	405	23	204	32
Belleville	28	1	28	2	11	2
Black Earth	17	1	17	1	11	2
Blue Mounds	9	<1	9	<1	4	1
Brooklyn	2	<1	2	<1	1	<1
Cambridge	7	<1	7	<1	4	1
Cottage Grove	15	1	15	1	8	1
Cross Plains	19	1	19	1	4	1
Dane	4	<1	4	<1	3	<1
Deerfield	5	<1	5	<1	2	<1
DeForest	53	3	52	3	32	5
Maple Bluff	3	<1	3	<1	2	<1

Table 5: Municipalities of Survey Respondents Compared with Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Municipality	Clients Served		Surveys Mailed		Respondents	
	No.	Percent	No.	Percent	No.	Percent
Villages						
Marshall	9	<1	9	<1	3	<1
Mazomanie	20	1	20	1	8	1
McFarland	18	1	18	1	9	1
Mount Horeb	48	2	48	3	31	5
Oregon	59	3	59	3	22	3
Shorewood Hills	2	<1	2	<1	1	<1
Waunakee	87	4	87	5	48	8
Other	309	15	32	2	7	1
Post Office Box	8	<1	8	<1	2	<1
Current address is out of County	11	<1	11	1	0	0
Current address is out of state	3	<1	3	<1	0	0
Address is not in DCDHS System or not considered valid by Access Dane or the US Postal Service for geo-coding purposes	287	14	10	1	5	1
Total	2,045	100	1,768	100	639	100

Services Coordinated

Case managers coordinate a wide variety of services for case management participants.

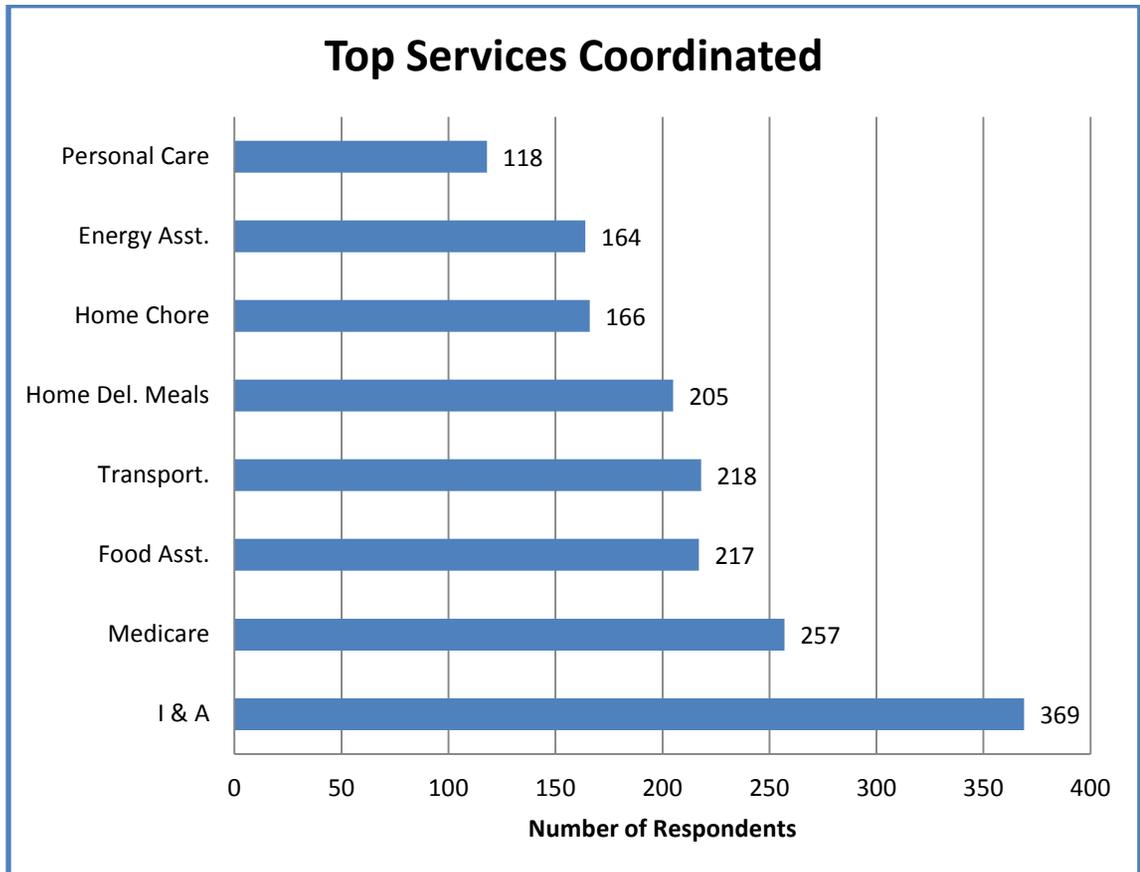
Of the survey respondents, 633 indicated one or more services with which their case manager provided coordination assistance.

The most frequently cited assistance was providing information and assistance (58%). Helping with the paperwork associated with Medicare/Medicaid/Medicare Part D was cited by 41% of respondents.

Case managers provided assistance with applying for benefits such as energy assistance (26%) and food assistance/Food Stamps/SNAP (34%) that helped to extend one's income.

Services critical to helping persons remain in their own home, such as home-delivered meals (32%), home chore (26%), and personal care services (19%) were also coordinated.

Graph 1: Most Frequently Cited Services Coordinated by Case Manager



Service Quality

Survey respondents rated their case managers highly in “always” treating them with respect (98.2%), returning their phone calls in a timely manner (92.9%), and explaining services in a way they could understand (93.0%).

Just 515 surveys responded to the question regarding whether the case manager did a good job of setting up services using the categories of always, sometimes, or never. Narrative feedback for this question provided by another 27 respondents provides some insights to the lower number of persons completing this survey item. 21 wrote in that the question was “not applicable” or “N/A;” 3 indicated that there was “no need;” 1 stated that the case manager “doesn’t do that for me;” 1 wrote that services were never used, and 1 indicated “not observed.” Additional narrative from the survey also noted that the current case manager listed on the survey form was not the individual who set up the services, rather they continued the existing services. This question should be reworked in the future. While still rated highly with 89.3% of respondents indicating their case manager “always” did a good job of setting up services for them, this question also had 5.2% of persons who responded “never.”

Table 6: Responses to Service Quality Related Questions

Survey Question	Percent of Respondents			
	Always	Sometimes	Never	Resp. (N)
Does your case manager return your phone calls in a timely manner?	92.9	6.1	1.0	606
Does your case manager explain your services in a way you can understand?	93.0	5.7	1.5	614
Does your case manager treat you with respect?	98.2	1.3	0.5	620
Does your case manager do a good job setting up services (transportation, meals, medical appointments, etc.) for you? ⁷	89.3	5.4	5.2	515

Sample of Comments from Survey Respondents

Very polite and understanding. She makes you feel like family & just love her.

On a couple of occasions, she didn't know the correct answer but didn't tell me that and gave me the wrong answer. It was complicated, so an "I don't know" would have been fine. She also doesn't always listen closely enough and sometimes doesn't provide a correct answer because she didn't understand the question.

Always very uplifting and really puts an effort in finding, referring me in the right direction to see [about] getting the help I can use and need.

She doesn't return phone calls very good. It takes her a long time to get back to me. Days, & sometimes a wk. That's too long.

She's cheerful, a fountain of knowledge & a joy to work with!

⁷ 1 respondent indicated 1.5 – which is between always and sometimes.

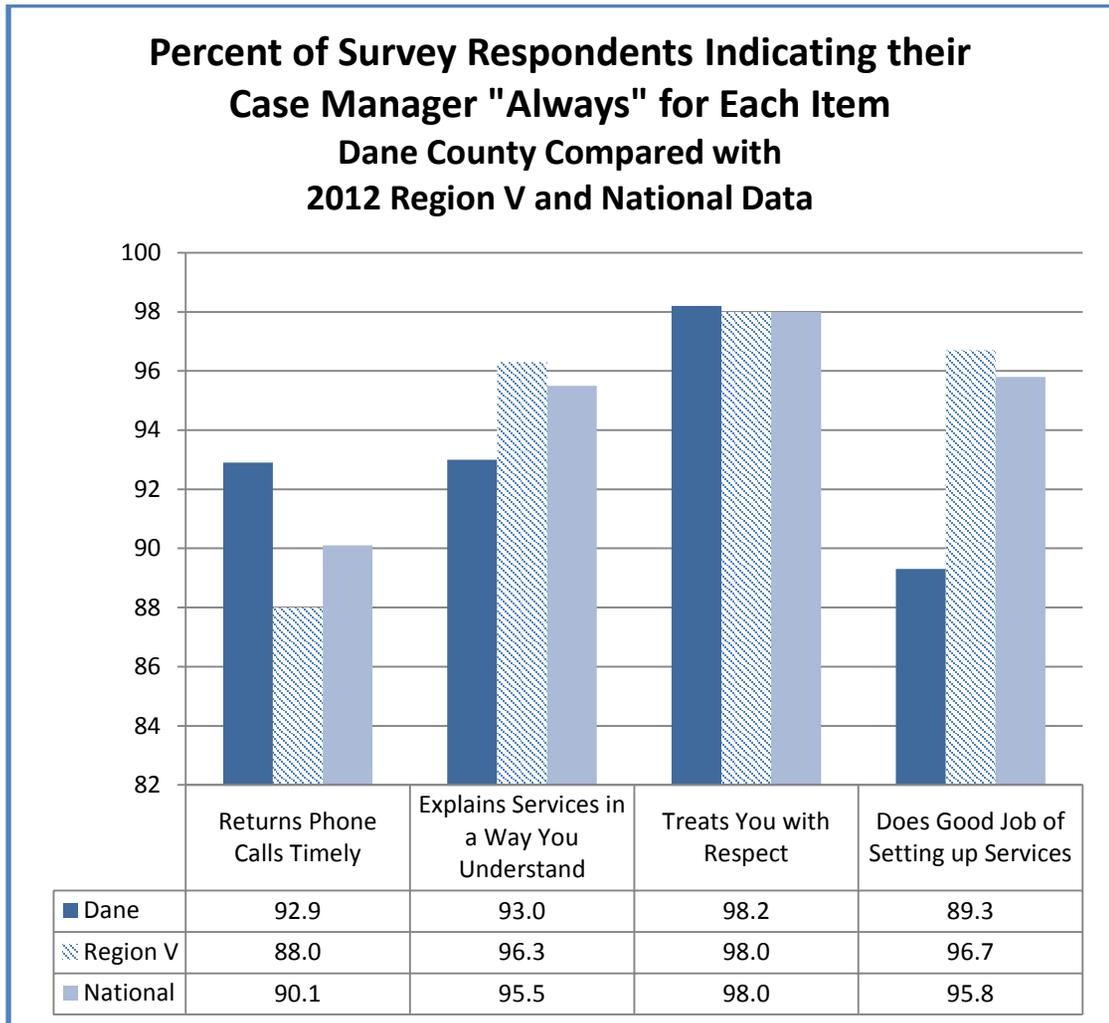
Graph 2 provides a comparison of the Dane County survey conducted in 2014 with the results of the 2012 National Survey of Older Americans Act Participants survey results for Region V - comprised of Illinois, Indiana, Michigan, Minnesota, Ohio, and Wisconsin – and with the national (non-stratified) results. This data is reported by the Administration on Aging via its AGing Integrated Database (AGID); 2012 is the most recent year for which data has been compiled at both the regional and national level.

Dane County respondents comparably rated their case managers as always treating them with respect as did the 2012 survey respondents for Region V and national data.

While Dane County respondents were slightly more likely than their peers who responded to the 2012 National Survey to indicate their case manager “always” returns their phone calls in a timely manner, they were slightly less likely to indicate that their case manager “always” explained services in a way they could understand.

Just 89.3% of Dane County respondents compared with 96.7% of 2012 Region V respondents and 95.8% of national respondents indicated their case manager “always” did a good job of setting up services for them.

Graph 2: Comparison of Dane County Survey Respondents with Respondents from 2012 National Survey of Older Americans Act Participants Survey for Region V and Nationally on Service Quality Related Questions



Region V = Illinois, Indiana, Michigan, Minnesota, Ohio, and Wisconsin.

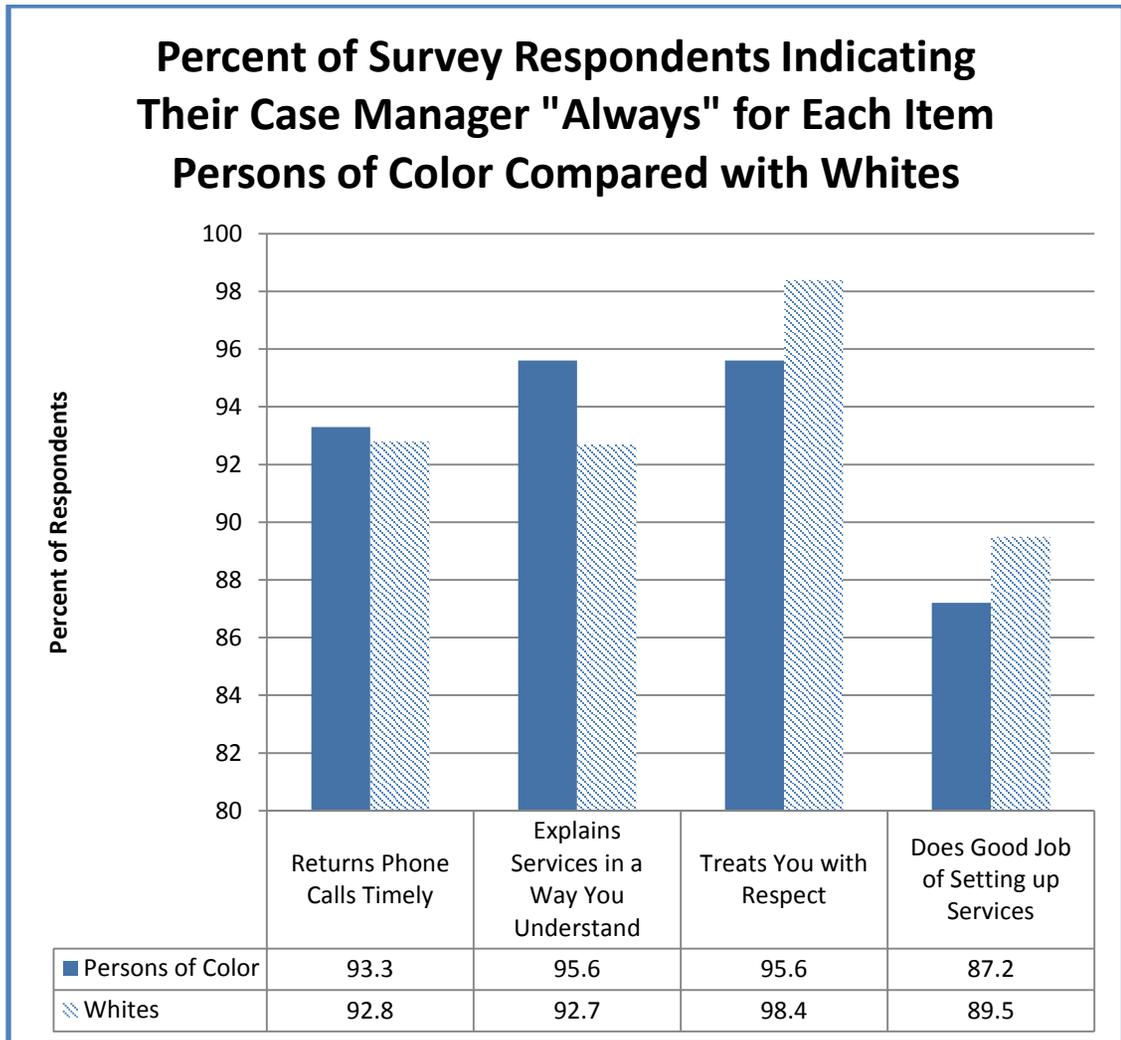
Responses to survey items related to service quality were compared for persons of color (those with a racial/ethnic background of Hispanic/Latino, African-American/Black, Asian, Pacific Islander, Native American) and persons who were considered White/Caucasian. As seen in Graph 3, there was little variation between how persons of color and whites perceived the quality of services.

Persons of color were slightly more likely to indicate that their case manager “always” returned their phone calls in a timely manner and that the case manager explained services in a way they could understand.

Whites were slightly more likely to indicate their case manager “always” treated them with respect and to do a good job of setting up services.

None of these variations were statistically significant.

Graph 3: Comparison of Responses to Items Related to Quality of Services for Persons of Color and Whites



N for persons of color = 45 for the first three items and 39 for the last. N for whites = 553 for phone calls, 560 for explaining services, 566 for treating with respect, and 467 for setting up.

Participation in Service Planning

Two items on the survey examined the client perception of whether the case manager involved the client in planning the services to be received. These were:

- Does your case manager involve you in discussing and planning your services?
- Are you able to select the services you receive?

Of survey respondents, 90.7% indicated that their case manager involved them in discussing and planning their services. In clarifying a “sometimes” response, an individual indicated that the service recipient had Alzheimer’s and was involved to the extent possible given this condition.

The survey question, “Are you able to select the services you receive?” tended to be more difficult for persons to answer. Just 561 of the 640 surveys (87.7%) responded using one of the two choices – yes or no. Among those with other responses, 7 individuals indicated that they did not receive any services, 1 individual indicated he/she was not able to do so without help, and as one individual put it, *Don’t really understand the question.* In the future consideration should be given to rewording this question.

Survey Question	Percent of Respondents			Resp. (N)
	Always	Sometimes	Never	
Does your case manager involve you in discussing and planning your services?	90.7	7.4	1.9	594

Survey Question	Percent of Respondents		Respondents (N)
	Yes	No	
Are you able to select the services you receive?	95.3	4.6	561

Sample of Comments from Survey Respondents

She isn't helpful, doesn't work with me. I still can't get her to get me the services I need.

Listen more closely, respect client's knowledge and ability more.

Make sure we need what worker considers we need – rent too high.

Overall Quality

Overall, survey respondents rated the case management services they received quite highly with 71% rating it as Excellent, 19% as Very Good, and 6% as Good.

Just 3% of the survey respondents rated the case management services as fair or poor.

Sample of Comments from Survey Respondents

It is a wonderful service.

It don't get no better. She's great.

Just keep up the good work!

6-Awful. So far as I'm concerned, I have no case manager.

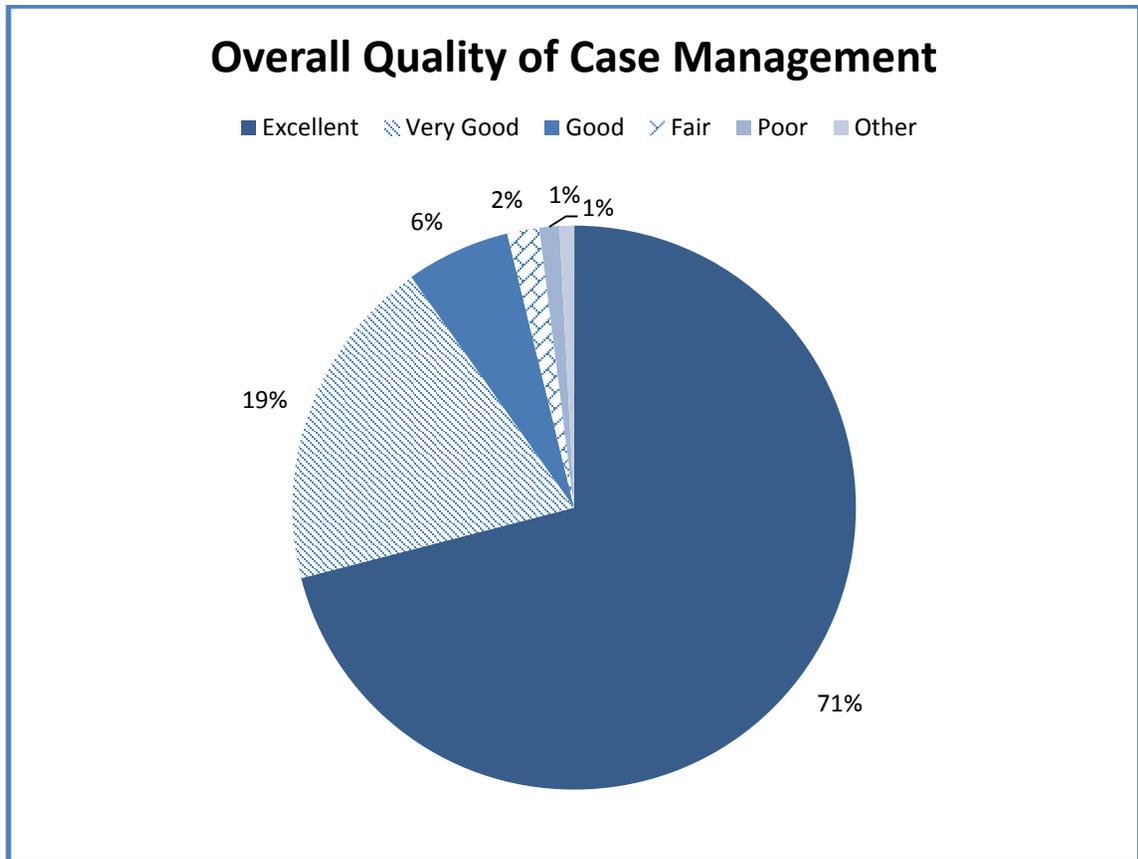
I am very happy that they have this type of services. I would be lost without them.

Just continue to provide the same excellent service.

Beyond Excellent.

This is a remarkable service.

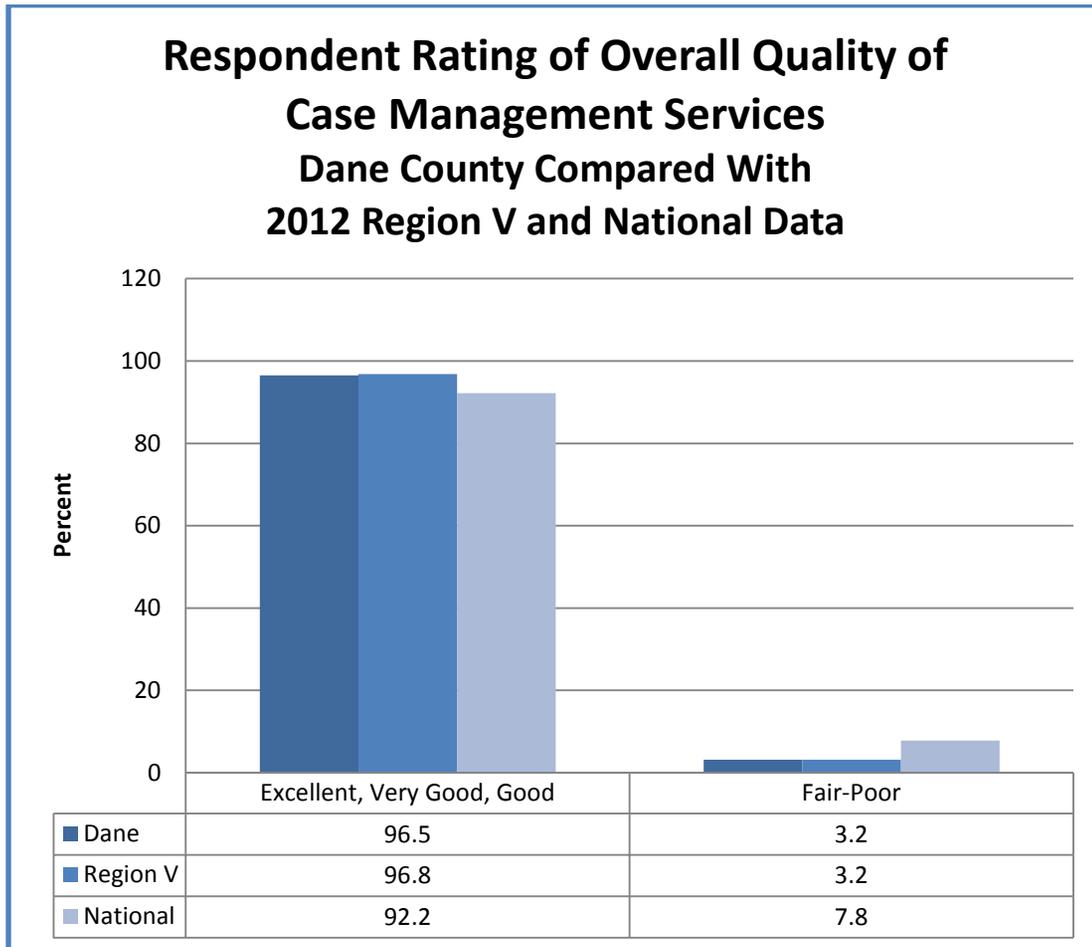
Graph 4: Overall Quality of Case Management Services



N = 603

As seen in Graph 5, 96.5% of the respondents to the 2014 Dane County survey rated the overall quality of the case management services as Excellent, Very Good, or Good. This was nearly the same percentage for the Region V respondents to the 2012 National Survey of Older Americans Act Participants and slightly higher than the national figure of 92.2%.

Graph 5: Comparison of Dane County Respondents Rating of Overall Quality of Case Management Services With Respondents from 2012 National Survey of Older Americans Act Participants Survey for Region V and Nationally

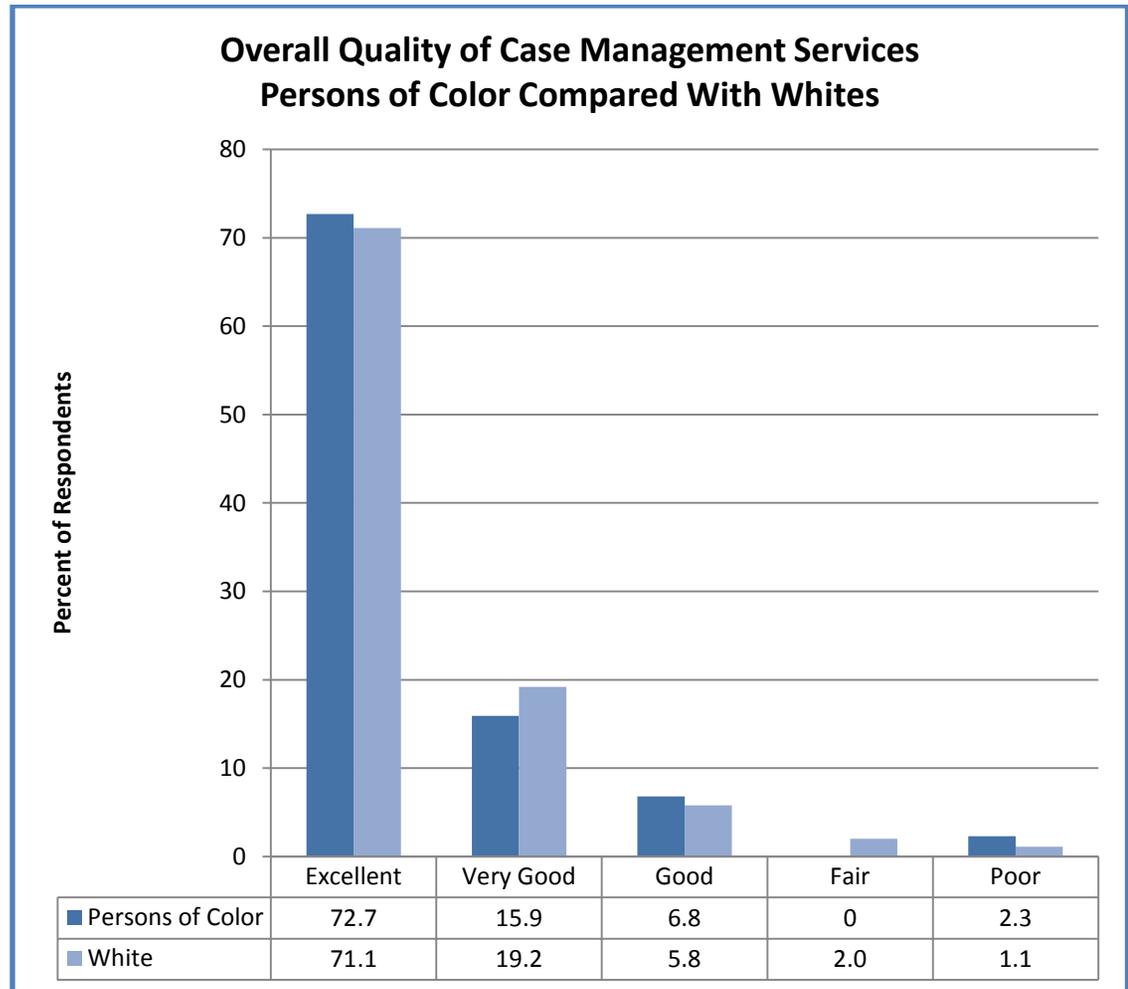


Region V = Illinois, Indiana, Michigan, Minnesota, Ohio, and Wisconsin.

How persons of color (those with a racial/ethnic background of Hispanic/Latino, African-American/Black, Asian, Pacific Islander, Native American) perceived the quality of case management services was compared with persons who were considered White/Caucasian.

There were no statistically significant differences⁸ in how persons of color perceived the overall quality of case management services compared with Whites/Caucasians.

Graph 6: Comparison of Rating of Overall Quality of Case Management Services by Persons of Color and Whites



N = 44 for persons of color and 551 for persons who are White. Percents will not equal 100. One person of color rated the case management services as 2-3 (Good to Very Good).

⁸ $\chi^2=1.699, df=9, p<.10$.

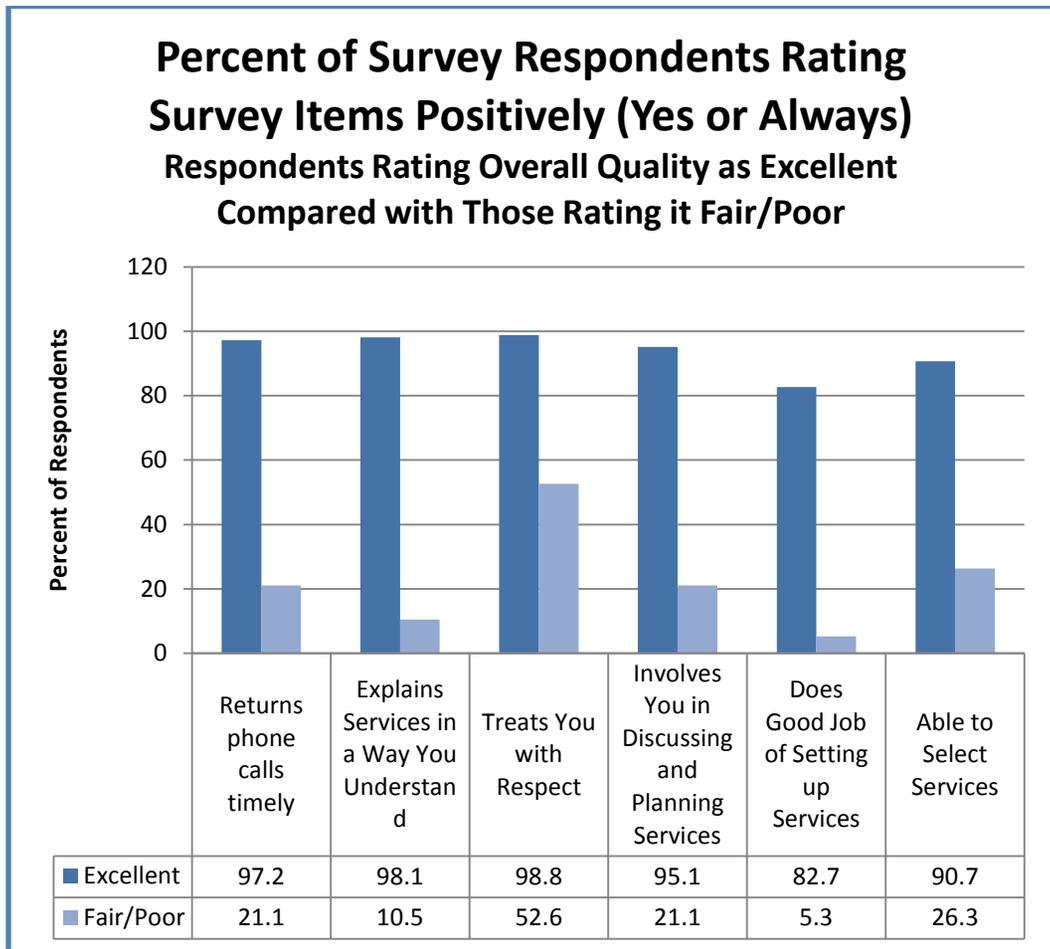
Survey respondents who rated the overall quality of case management services as “Excellent” were also more likely to positively rate their case manager compared with respondents who rated the overall quality of case management services as “Fair” or “Poor.”

Of respondents who rated the overall quality of case management services as “Excellent,” 98.1%, compared with 10.5% of those who rated the overall quality as “Fair” or “Poor” indicated that their case manager “Always” explained their services in a way they could understand.

Respondents who rated the overall quality of case management services as “Excellent” indicated that their case manager “Always” returned their phone calls in a timely manner (97.2%). This compares with 21.1% of respondents who rated the overall quality as “Fair” or “Poor.”

Just 5.3% of respondents who rated the overall quality of services as “Fair” or “Poor” noted their case manager “Always” did a good job of setting up services. This contrasts with 82.7% of those who rated the overall quality as “Excellent.”

Graph 7: Comparison of Overall Quality Rating With Rating of Key Items



N = 428 for overall quality as “Excellent” and N = 19 for overall quality as Fair or Poor.

Benefits

The survey instrument also looked at some of the benefits of receiving case management services.

Survey respondents indicated that their case manager helped them get services they did not have before (91.6%) and that their situation was better because of their case manager's help (96.0%).

Of the respondents to the survey, 91.6% indicated the case management services helped them to continue to live at home. While this is an overwhelming majority, this question also appeared to be a bit problematic as just 524 of the 640 respondents (82%) answered this question.

The lowest rated area was, "As a result of receiving case management services, do you have a better idea of where to get information about other services?" One out of every five respondents indicated "No." Part of the lower response rate may be due to respondents indicating that if they had a question, they went to their case manager.

Table 7: Benefits of Receiving Case Management Services by Survey Item

Survey Question	Percent of Respondents		
	Yes	No	Respondents (N)
Does your case manager help you get services that you did not have before?	90.9	7.7	581 ⁹
As a result of receiving the case management services, do you have a better idea of where to get information about other services?	79.5	20.3	580 ¹⁰
Is your situation better because of your case manager's help?	96.0	3.5	599 ¹¹
Do the case management services help you continue to live at home?	91.6	6.1	524 ¹²

Sample of Comments from Survey Respondents

It has helped me to get my life back into order and gave me the comfort that someone was there to help me. My life is very happy and content now thank[s] to my case manager.

It helps if I have questions - she can have answers and if there are discounts or programs available she lets me know if I don't know they are there.

Mostly, I don't feel alone in this world, and it helped to have someone who is always there for you and you don't have to be afraid to ask about things other people think you should know.

⁹ 5 respondents indicated NA, 3 indicated services were not needed or they had not asked for any, and 1 person indicated he/she had services via a previous case manager.

¹⁰ 1 respondent indicated "sometimes." Percent will not total 100 as a result.

¹¹ 1 respondent each indicated "does not apply," "somewhat," "ok." Percent will not total 100.

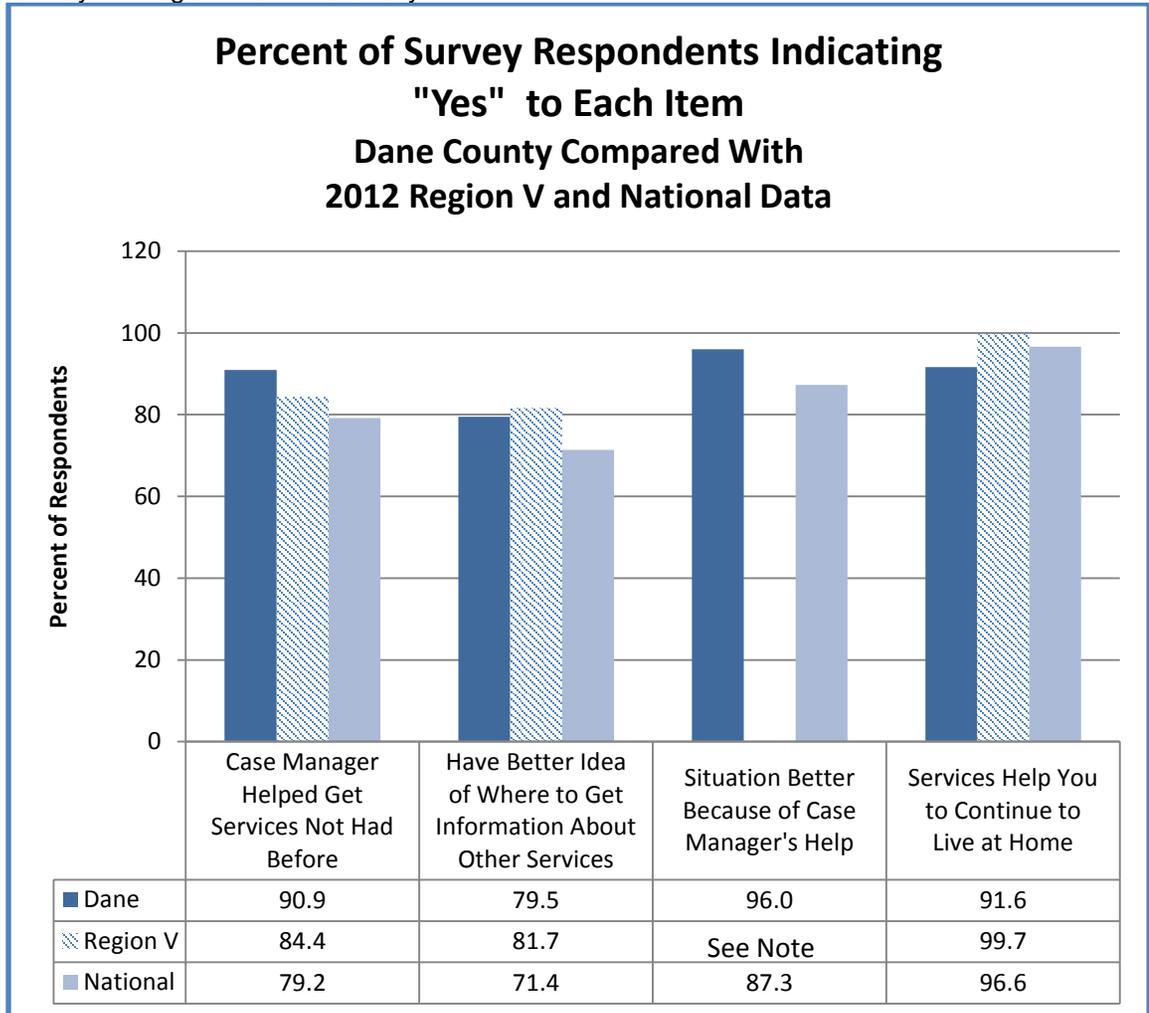
¹² 2.3% of respondents provided a written response. 5 indicated this was not applicable, 5 indicated they no longer lived at home, 1 entered a question mark, and 1 indicated the primary service recipient was deceased. Percent will not total 100 as a result.

Graph 8 provides a comparison of the Dane County survey conducted in 2014 with the results of the 2012 National Survey of Older Americans Act Participants survey results for Region V and with the national (non-stratified) results.

Dane County survey respondents were more likely than the 2012 survey respondents at the Region V and national level to indicate that their case manager helped them get services they did not have before.

Dane County survey respondents were less likely than the 2012 survey respondents to indicate that the case management services helped them to continue to live at home.

Graph 8: Comparison of Dane County Respondents Rating of Benefits of Case Management Services with Respondents from 2012 National Survey of Older Americans Act Participants Survey for Region V and Nationally



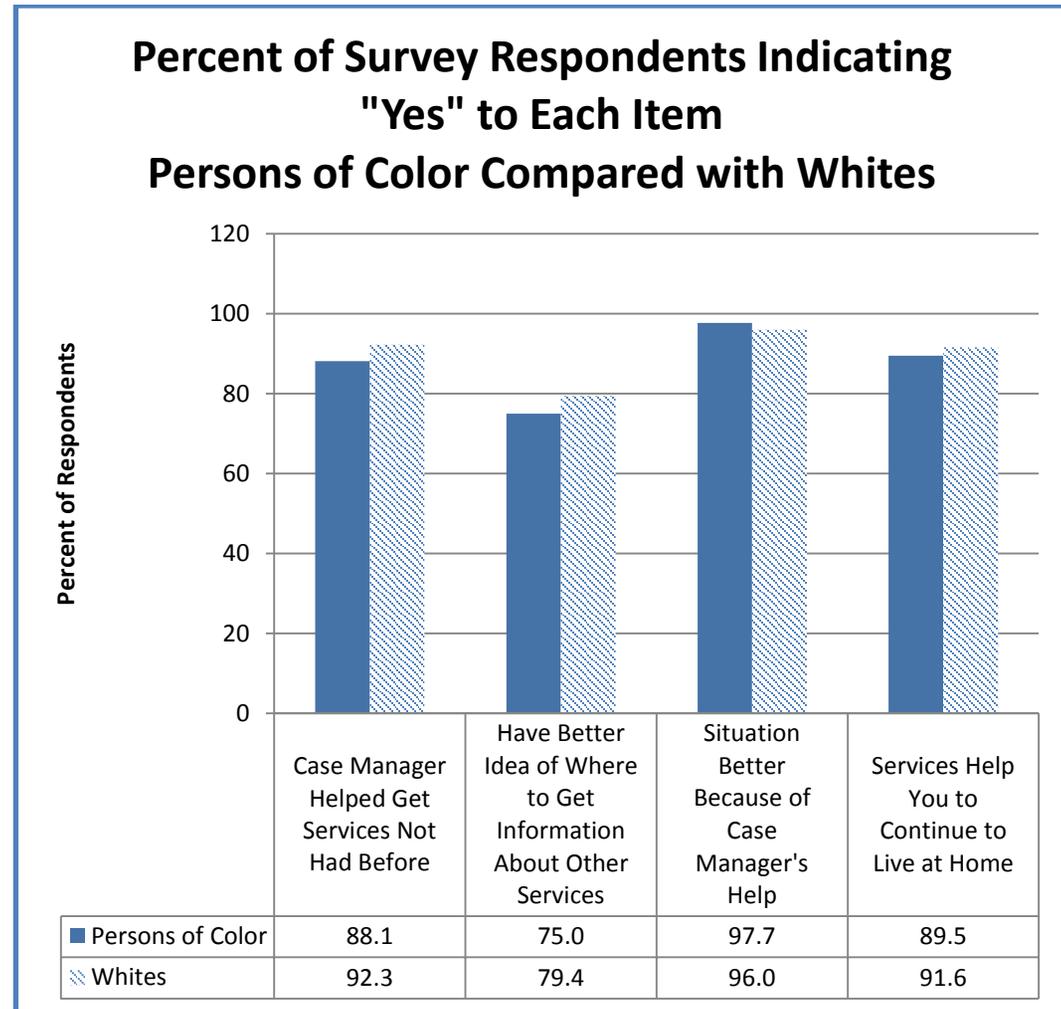
Region V = Illinois, Indiana, Michigan, Minnesota, Ohio, and Wisconsin.

Note: Region V data was not available regarding whether the situation was better because of the case manager's help.

Responses to survey items related to the benefits of case management services were compared for persons of color (those with a racial/ethnic background of Hispanic/Latino, African-American/Black, Asian, Pacific Islander, Native American) and persons who were considered White/Caucasian. This is seen in Graph 9.

There were no statistically significant differences between persons of color and whites in indicating their case manager helped them get services they had not had before, in having a better idea of where to get information about other services, and in indicating their situation was better because of their case manager's help. There was also no statistical difference between these two populations in indicating that the services helped them to continue to live at home.

Graph 9: Comparison of Responses to Items Related to Benefits of Case Management Services for Persons of Color and Whites



N for persons of color = 42 for services, 40 for better idea about information, 44 for situation, and 38 for continuing to live at home. N for whites = 522 for services, 533 for better idea about information, 546 for situation, and 479 for continuing to live at home.

The survey had a free-form question that asked, "How has the case management service helped you?" Just 453 respondents replied to this question, of which 436 had responses that were useable. Those that were not useable for this purpose included a "?", no comment, and N/A.

Responses were broken out into one or more of 12 categories.

Respondents (31.0%) were most likely to indicate that the case management services had helped them obtain or coordinate services from those cited on the Services Coordinated section of this report.

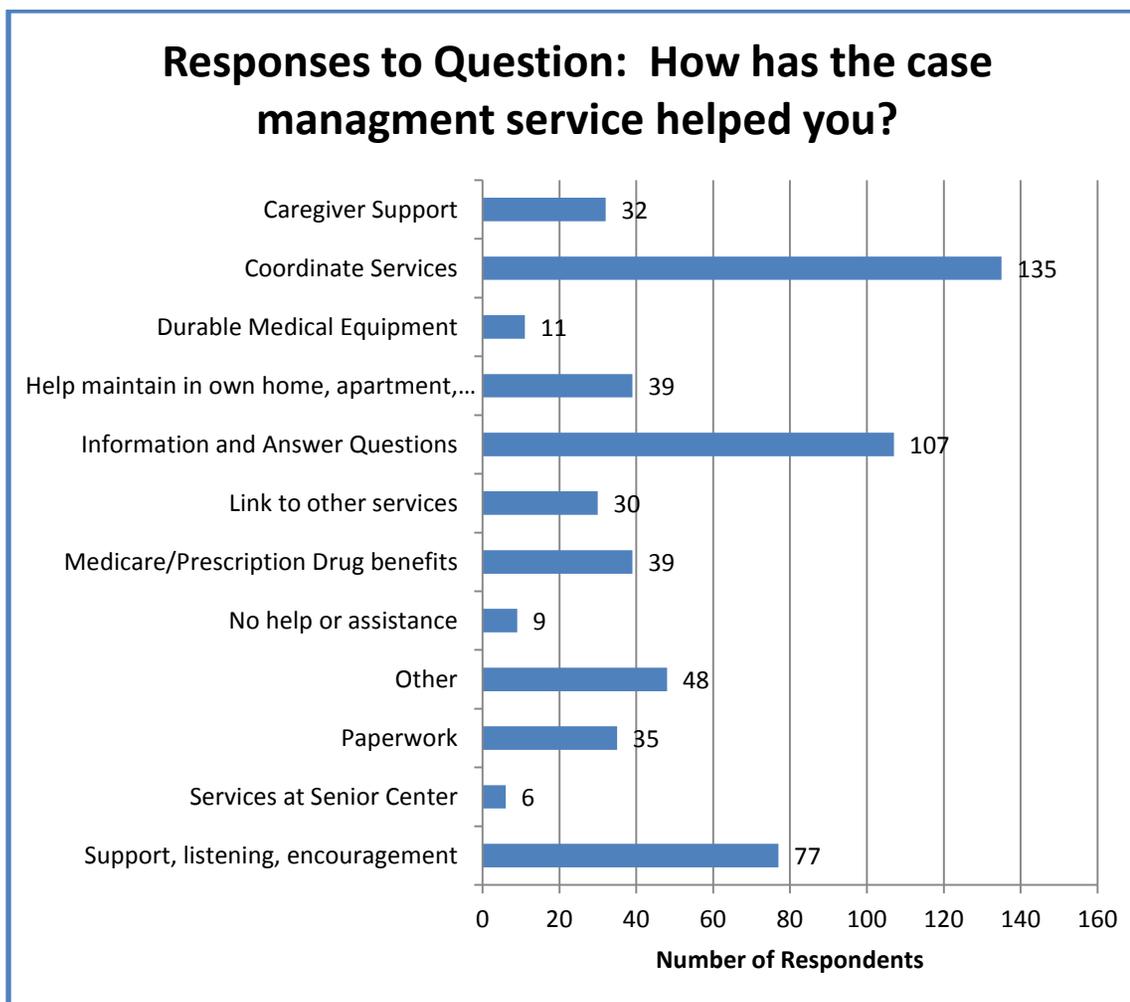
Answering questions and providing information (24.5%) along with support, listening, and encouragement (17.7%) were the next most frequently cited help.

The category of Other included persons who indicated help with facilitating moves, finding insurance, assistance with finances, and those who responded "yes."

Respondents (8.9%) indicated that the case management services enabled them to continue to live in their own home or apartment or to remain living independently.

A small number of respondents (2.1%) noted that the case management service had not been helpful.

Graph 10: Grouped Responses to Survey Question "How has the case management service helped you?"



N = 436

Other = "yes, in many ways", "able to better health situation", "excellent", and other comments.

Recommendations for Improvement

The survey had a free-form question that asked, "What recommendations do you have for improving case management services?" Of the 309 respondents to this question, 70.2% (217) indicated that they had no recommendations for improvement. Four (4) surveys recorded "?" and were excluded from further analysis.

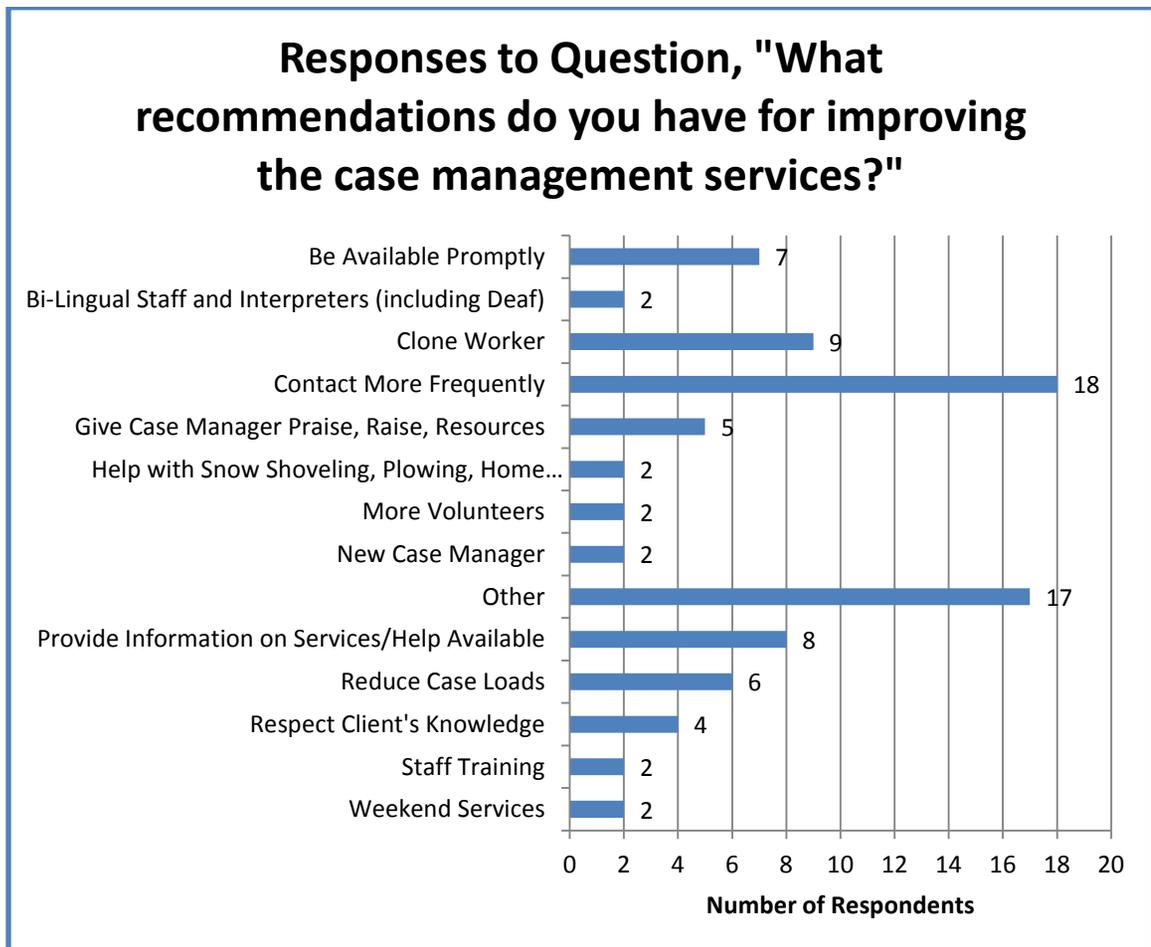
Many of the written comments were praise for the services as seen in the following:

- *You cannot improve on a diamond!!!*
- *I have no recommendations for the case management could not possibly be improved.*
- *It's not possible to improve upon 110%.*

Responses for the remaining comments were broken out into one or more of 14 categories as seen in Graph 11.

The largest share of the comments dealt with contacting clients more frequently either in-person or via phone, following-up, and conducting more home visits. Persons who suggested reducing case loads mentioned that case managers could be hurried.

Graph 11: Grouped Responses to Survey Question "What recommendations do you have for improving the case management services?"



Eight written comments mentioned providing additional information on the services or help that is available to clients. One individual noted that he/she did not have access to a computer, thus, *"It would be helpful to have a notebook or binder of available services."*

One individual suggested that *"magnetic business cards would be nice to put on the frig."*

Seven (7) respondents commented on the need for case managers and services to be available more promptly. This included having additional hours and doing outreach quickly when a referral is made.

A couple of comments dealt with a need for staff training in the areas of: available resources and how to access them, client confidentiality, and a hierarchy for addressing concerns.

Two surveys mentioned the need for bi-lingual staff and for access to interpreters for the deaf. As noted by one individual, *"Many people think I can write notes. Yes, I do. We need to learn I do need interpreter for the Deaf at times."*

Results by Contracted Agency

The following section of the report presents the findings for each contracted agency. All data is based on percentages of survey respondents.

Agency	Avg. Number of Services Coordinated Per Survey Respondent	Q1. Which services does your case manager help to coordinate for you? (Check all that apply).					
		Adult Day Services	Energy Assistance	Food Assistance/ Food Stamps/ SNAP	Home Chore	Home Delivered Meals	Homemaker/ Housekeeper
City of Fitchburg	3.3	20.0	10.0	13.3	30.0	30.0	23.3
City of Middleton	3.6	12.9	19.4	38.7	19.4	29.0	6.5
City of Stoughton	4.2	10.9	50.0	45.7	30.4	41.3	28.3
Colonial Club	3.5	21.6	31.4	37.3	19.6	25.5	19.6
DeForest Area	4.3	20.0	45.7	65.7	17.1	20.0	11.4
East Madison/Monona	2.6	11.4	20.5	31.8	50.0	11.4	6.8
North/Eastside Senior (NESCO)	3.7	12.5	33.3	41.7	37.5	18.8	12.5
Northwest Dane	2.7	8.6	14.3	17.1	22.9	51.4	5.7
Senior Citizens of Belleville, Exeter, Montrose	3.6	22.6	19.4	25.8	35.5	71.0	16.1
South Madison (SMCE)	4.2	12.6	12.6	34.7	25.3	20.0	12.6
Village of McFarland	3.3	6.7	53.3	46.7	6.7	20.0	0.0
Village of Mount Horeb (SW Dane)	4.3	13.9	44.4	36.1	27.8	47.2	16.7
Village of Oregon	3.3	11.1	14.8	14.8	14.8	40.7	3.7
Village of Waunakee	3.2	11.4	25.3	26.6	19.0	51.9	12.7
West Madison (WMSC)	3.1	13.5	10.8	32.4	27.0	10.8	8.1

Agency	Q1 (continued). Which services does your case manager help to coordinate for you? (Check all that apply).						
	Housing Assistance	Information & Assistance	Legal Assistance	Medicare/Medicaid	Medication Management	Personal Care Services	Transportation
City of Fitchburg	16.7	53.3	13.3	26.7	13.3	26.7	43.3
City of Middleton	16.1	61.3	16.1	51.6	6.5	22.6	41.9
City of Stoughton	13.0	63.0	19.6	39.1	15.2	21.7	21.7
Colonial Club	5.9	56.9	15.7	49.0	5.9	13.7	25.5
DeForest Area	17.1	77.1	25.7	57.1	17.1	14.3	37.1
East Madison/Monona	9.1	45.5	9.1	18.2	6.8	9.1	18.2
North/Eastside Senior (NESCO)	14.6	47.9	20.8	43.8	16.7	14.6	37.5
Northwest Dane	11.4	45.7	5.7	14.3	11.4	20.0	25.7
Senior Citizens of Belleville, Exeter, Montrose	12.9	61.3	16.1	29.0	6.5	12.9	25.8
South Madison (SMCE)	37.9	57.9	14.7	63.2	25.3	27.4	50.5
Village of McFarland	6.7	66.7	6.7	40.0	20.0	13.3	13.3
Village of Mount Horeb (SW Dane)	13.9	58.3	16.7	36.1	27.8	25.0	52.8
Village of Oregon	3.7	70.4	25.9	33.3	11.1	33.3	29.6
Village of Waunakee	1.3	55.7	11.4	36.7	11.4	11.4	31.6
West Madison (WMSC)	21.6	59.5	13.5	27.0	13.5	13.5	32.4

Agency	Q2. Do you know how to contact your case manager when you need to?				Q3. Does your case manager return your phone calls in a timely manner?			
	Yes	No	Respondents		Always	Sometimes	Never	Respond.
Overall	97.0	3.0	627		92.9	6.1	1.0	606
City of Fitchburg	96.6	3.4	29		96.6	3.4	0.0	29
City of Middleton	100.0	0.0	31		86.2	6.9	6.9	29
City of Stoughton	95.5	4.5	42		97.8	2.2	0.0	45
Colonial Club	100.0	0.0	50		84.0	16.0	0.0	50
DeForest Area	100.0	0.0	34		97.1	2.9	0.0	35
East Madison/Monona	93.0	7.0	43		73.8	21.4	4.8	42
North/Eastside (NESCO)	93.6	6.4	47		93.0	4.7	2.3	43
Northwest Dane	100.0	0.0	35		100.0	0.0	0.0	32
Senior Citizens Program of Belleville, Exeter, Montrose	100.0	0.0	31		100.0	0.0	0.0	30
South Madison (SMCE)	98.9	1.1 ¹³	94		91.2	7.7	1.1	91
Village of McFarland	92.9	7.1	14		92.9	7.1	0.0	14
Village of Mount Horeb (SW Dane)	91.4	8.6	35		100.0	0.0	0.0	32
Village of Oregon	96.3	3.7	27		100.0	0.0	0.0	24
Village of Waunakee	98.7	1.3	77		97.4	2.6	0.0	77
West Madison (WMSC)	91.7	8.3	36		90.9	9.1	0.0	33

¹³ One individual indicated that he/she lost the good cell phone, hence the reason for responding “no.”

Agency	Q4. Does your case manager explain your services in a way you can understand?					Q5. Does your case manager treat you with respect?			
	Always	Sometimes	Never	Respond.		Always	Sometimes	Never	Respond.
Overall	93.0	5.7	1.5	614		98.2	1.3	0.5	620
City of Fitchburg	93.1	3.4	3.4	29		100.0	0.0	0.0	28
City of Middleton	96.8	0.0	3.2	31		96.8	0.0	3.2	31
City of Stoughton	95.7	2.2	2.2	46		100.0	0.0	0.0	46
Colonial Club	91.5	6.4	2.1	47		100.0	0.0	0.0	51
DeForest Area	100.0	0.0	0.0	34		100.0	0.0	0.0	35
East Madison/Monona	81.0	14.3	4.8	42		92.7	4.9	2.4	41
North/Eastside (NESCO)	90.9	4.5	4.5	44		95.6	2.2	2.2	45
Northwest Dane	94.1	5.9	0.0	34		100.0	0.0	0.0	34
Senior Citizens Program of Belleville, Exeter, Montrose	90.3	9.7	0.0	31		100.0	0.0	0.0	31
South Madison (SMCE)	92.4	7.6	0.0	92		97.8	2.2	0.0	92
Village of McFarland	86.7	6.7	6.7	15		100.0	0.0	0.0	15
Village of Mount Horeb (SW Dane)	100.0	0.0	0.0	32		96.9	3.1	0.0	32
Village of Oregon	100.0	0.0	0.0	24		100.0	0.0	0.0	26
Village of Waunakee	96.2	3.8	0.0	78		98.7	1.3	0.0	78
West Madison (WMSC)	85.7	14.3	0.0	35		97.1	2.9	0.0	35

Agency	Q6. Does your case manager involve you in discussing and planning your services?					Q7. Does your case manager do a good job setting up services (transportation, meals, medical appointments, etc.) for you?			
	Always	Sometimes	Never	Respond.		Always	Sometimes	Never	Respond.
Overall	90.7	7.4	1.9	594		89.3	5.4	5.2	515
City of Fitchburg	92.0	8.0	0.0	25		100.0	0.0	0.0	19
City of Middleton	83.3	13.3	3.3	30		78.6	7.1	10.7	27
City of Stoughton	93.2	6.8	0.0	45		97.4	2.6	0.0	39
Colonial Club	97.9	2.1	0.0	47		88.1 ¹⁴	7.1	2.4	42
DeForest Area	91.4	2.9	5.7	35		96.7	0.0	3.3	30
East Madison/Monona	75.0	20.0	5.0	40		60.0	16.7	23.3	30
North/Eastside (NESCO)	90.0	5.0	5.0	40		82.4	5.9	11.6	34
Northwest Dane	87.9	12.1	0.0	33		92.9	7.1	0.0	28
Senior Citizens Program of Belleville, Exeter, Montrose	100.0	0.0	0.0	31		96.6	3.4	0.0	29
South Madison (SMCE)	90.3	8.6	1.1	93		86.6	8.5	4.9	82
Village of McFarland	78.6	14.3	7.1	14		66.7	22.2	11.1	9
Village of Mount Horeb (SW Dane)	100.0	0.0	0.0	28		100.0	0.0	0.0	32
Village of Oregon	95.7	4.3	0.0	23		90.5	4.8	4.8	21
Village of Waunakee	94.8	3.9	2.6	77		95.5	3.0	1.5	67
West Madison (WMSC)	87.9	12.1	0.0	33		84.6	3.8	11.5	26

¹⁴ One individual indicated 1.5 which is between always and sometimes.

Agency	Q9. Does your case manager help you get services that you did not have before?					Q10. Are you able to select the services you receive?			
	Yes	No	Other Response	Respond.		Yes	No	Other Response	Respond.
Overall	90.9	7.7	1.4	581		93.5	4.5	1.9	561
City of Fitchburg	89.3	7.1	3.6	28		95.8	0.0	4.2	23
City of Middleton	90.0	10.0	0.0	30		96.3	3.7	0.0	27
City of Stoughton	97.7	2.3	0.0	44		95.5	2.3	2.3	43
Colonial Club	93.9	6.1	0.0	49		95.7	2.1	2.1	46
DeForest Area	93.5	3.2	3.2	31		97.0	3.0	0.0	33
East Madison/Monona	76.3	23.7	0.0	38		75.7	24.3	0.0	37
North/Eastside (NESCO)	85.7	11.9	2.4	42		90.2	7.3	2.4	40
Northwest Dane	96.6	3.4	0.0	29		96.9	3.4	0.0	32
Senior Citizens Program of Belleville, Exeter, Montrose	89.7	6.9	3.4	29		100.0	0.0	0.0	30
South Madison (SMCE)	89.9	7.9	2.2	89		90.7	4.7	4.7	82
Village of McFarland	93.3	6.7	0.0	15		100.0	0.0	0.0	13
Village of Mount Horeb (SW Dane)	93.3	6.7	0.0	30		100.0	0.0	0.0	32
Village of Oregon	95.8	4.2	0.0	24		88.0	4.0	8.0	23
Village of Waunakee	94.2	2.9	2.9	69		98.5	0.0	15.	67
West Madison (WMSC)	85.3	14.7	0.0	34		87.9	12.1	0.0	33

Agency	Q11. As a result of receiving the case management services, do you have a better idea of where to get information about other services?					Q12. Is your situation better because of your case manager's help?			
	Yes	No	Other Response	Respond.		Yes	No	Other Response	Respond.
Overall	79.2	20.1	0.7	580		96.0	3.5	0.5	599
City of Fitchburg	75.0	25.0	0.0	24		100.0	0.0	0.0	26
City of Middleton	82.8	17.2	0.0	29		96.6	3.4	0.0	29
City of Stoughton	71.1	28.9	0.0	45		97.8	2.2	0.0	46
Colonial Club	83.3	16.7	0.0	48		95.9	4.1	0.0	49
DeForest Area	78.8	21.2	0.0	33		100.0	0.0	0.0	32
East Madison/Monona	62.5	35.0	2.5	40		82.9	17.1	0.0	41
North/Eastside (NESCO)	76.3	23.7	0.0	38		90.9	9.1	0.0	44
Northwest Dane	91.2	8.8	0.0	34		97.1	2.9	0.0	35
Senior Citizens Program of Belleville, Exeter, Montrose	90.3	9.7	0.0	31		96.8	3.2	0.0	31
South Madison (SMCE)	73.0	25.8	1.1	88		97.8	1.1	1.1	89
Village of McFarland	75.0	25.0	0.0	12		100.0	0.0	0.0	13
Village of Mount Horeb (SW Dane)	75.0	25.0	0.0	32		96.8	0.0	3.2	31
Village of Oregon	87.5	8.3	4.2	23		91.7	4.2	4.2	24
Village of Waunakee	90.0	8.6	1.4	70		100.0	0.0	0.0	74
West Madison (WMSC)	78.8	21.2	0.0	33		94.3	5.7	0.0	35

Agency	Q13. How has the case management service helped you? (Free-form narrative classified into categories of responses.)						
	Caregiver Support	Coordinate or Obtain Services	Durable Medical Equipment Obtained	Help Maintain in Own Home, Apartment, or Community	Information and Answer Questions	Link to Other Services	Medicare/ Prescription Drug Benefit
City of Fitchburg	3.3	36.7	3.3	10.0	10.0	6.7	3.3
City of Middleton	0.0	6.5	3.2	9.7	19.4	0.0	3.2
City of Stoughton	6.5	32.6	2.2	6.5	15.2	6.5	6.5
Colonial Club	3.9	19.6	0.0	7.8	21.6	5.9	15.7
DeForest Area	5.7	8.6	5.7	11.4	25.7	0.0	0.0
East Madison/Monona	0.0	20.5	0.0	4.5	18.2	2.3	2.3
North/Eastside (NESCO)	4.2	12.5	0.0	4.2	12.5	2.1	4.2
Northwest Dane	0.0	37.1	2.9	0.0	8.6	5.7	5.7
Senior Citizens of Belleville, Exeter, Montrose	6.5	16.1	0.0	9.7	16.1	3.2	16.1
South Madison (SMCE)	13.7	22.1	1.1	7.4	15.8	7.4	4.2
Village of McFarland	0.0	20.0	0.0	0.0	13.3	6.7	26.7
Village of Mount Horeb (SW Dane)	5.6	25.0	0.0	0.0	16.7	8.3	0.0
Village of Oregon	3.7	11.1	11.1	7.4	11.1	3.7	3.7
Village of Waunakee	3.8	20.3	0.0	7.6	19.0	3.8	7.6
West Madison (WMSC)	2.7	24.3	2.7	0.0	21.6	5.4	0.0

Agency	Q13 (continued). How has the case management service helped you? (Free-form narrative classified into categories of responses.)				
	Not Helped	Other	Paperwork	Services at Senior Center	Support, Listening, Encouragement
City of Fitchburg	0.0	13.3	3.3	3.3	10.0
City of Middleton	3.2	6.5	3.2	3.2	3.2
City of Stoughton	0.0	6.5	8.7	0.0	19.6
Colonial Club	0.0	7.8	3.9	0.0	23.5
DeForest Area	0.0	2.9	8.6	0.0	5.7
East Madison/Monona	11.4	9.1	9.1	0.0	13.6
North/Eastside (NESCO)	2.1	14.6	6.3	2.1	8.3
Northwest Dane	0.0	2.9	2.9	0.0	14.3
Senior Citizens of Belleville, Exeter, Montrose	0.0	6.5	3.2	0.0	6.5
South Madison (SMCE)	0.0	5.3	4.2	0.0	12.6
Village of McFarland	0.0	0.0	0.0	0.0	6.7
Village of Mount Horeb (SW Dane)	0.0	8.3	0.0	0.0	8.3
Village of Oregon	0.0	18.5	0.0	0.0	22.2
Village of Waunakee	0.0	5.1	10.1	3.8	7.6
West Madison (WMSC)	5.4	8.1	8.1	0.0	10.8

Agency	Q14. What recommendations do you have for improving the case management services? (Free-form narrative classified into categories of responses.)						
	Contact More Frequently (Calls, Home Visits, Follow-up)	Provide Information on Services/ Help Available	Be Available Promptly	Respect Client's Knowledge	Reduce Case Loads	Provide Staff Training on Resources, Client Confidentiality, Hierarchy for Concerns	Provide Bi-Lingual Staff and Interpreters for Deaf
City of Fitchburg	0.0	0.0	0.0	0.0	0.0	0.0	0.0
City of Middleton	6.5	0.0	3.2	3.2	0.0	0.0	3.2
City of Stoughton	4.3	2.2	2.2	0.0	0.0	0.0	0.0
Colonial Club	5.9	0.0	2.0	0.0	3.9	0.0	0.0
DeForest Area	0.0	0.0	0.0	0.0	2.9	0.0	0.0
East Madison/Monona	11.4	6.8	2.3	0.0	2.3	0.0	0.0
North/Eastside (NESCO)	0.0	0.0	0.0	0.0	0.0	0.0	2.1
Northwest Dane	2.9	0.0	0.0	2.9	0.0	0.0	0.0
Senior Citizens of Belleville, Exeter, Montrose	0.0	3.2	0.0	0.0	3.2	0.0	0.0
South Madison (SMCE)	0.0	2.1	1.1	2.1	1.1	0.0	0.0
Village of McFarland	0.0	6.7	0.0	0.0	0.0	0.0	0.0
Village of Mount Horeb (SW Dane)	2.8	0.0	0.0	0.0	0.0	0.0	0.0
Village of Oregon	3.7	0.0	0.0	0.0	0.0	0.0	0.0
Village of Waunakee	1.3	0.0	0.0	0.0	0.0	1.3	0.0
West Madison (WMSC)	5.4	0.0	5.4	0.0	0.0	2.7	0.0

Agency	Q15. Are you satisfied with the case management services you receive?					Q16. Do the case management services help you continue to live at home?			
	Yes	No	Other Response	Respond.		Yes	No	Other Response	Respond.
Overall	96.4	3.1	0.5	590		92.0	6.1	1.7	524
City of Fitchburg	100.0	0.0	0.0	26		95.8	0.0	4.2	24
City of Middleton	96.6	3.4	0.0	29		95.5	4.5	0.0	22
City of Stoughton	100.0	0.0	0.0	45		97.8	2.2	0.0	45
Colonial Club	100.0	0.0	0.0	47		100.0	0.0	0.0	37
DeForest Area	100.0	0.0	0.0	32		96.6	3.4	0.0	29
East Madison/Monona	78.4	18.9	2.7	37		89.2	10.8	0.0	37
North/Eastside (NESCO)	95.3	4.7	0.0	43		89.7	10.3	0.0	39
Northwest Dane	100.0	0.0	0.0	33		96.2	0.0	3.8	26
Senior Citizens Program of Belleville, Exeter, Montrose	100.0	0.0	0.0	31		96.4	3.6	6.0	28
South Madison (SMCE)	95.6	3.3	1.1	91		73.5	19.3	0.0	83
Village of McFarland	92.9	7.1	0.0	14		92.3	7.7	0.0	13
Village of Mount Horeb (SW Dane)	97.0	0.0	3.0	33		100.0	0.0	0.0	28
Village of Oregon	100.0	0.0	0.0	23		95.2	0.0	4.8	21
Village of Waunakee	98.6	1.4	0.0	72		96.9	3.1	0.0	64
West Madison (WMSC)	91.2	8.8	0.0	34		92.9	3.6	3.6	28

Agency	Q.17 How would you rate the overall quality of the case management services you have received? Would you say....						
	Excellent	Very Good	Good	Fair	Poor	Other	Respond.
Overall	71.0	19.2	6.0	1.8	1.2	0.8	603
City of Fitchburg	88.5	7.7	0.0	0.0	3.8	0.0	26
City of Middleton	65.5	27.6	3.4	0.0	0.0	3.4 ¹⁵	29
City of Stoughton	73.3	20.0	2.2	4.4	0.0	0.0	45
Colonial Club	64.6	20.8	14.6	0.0	0.0	0.0	48
DeForest Area	76.5	17.6	5.9	0.0	0.0	0.0	34
East Madison/Monona	38.5	30.8	12.8	7.7	7.7	2.6 ¹⁶	39
North/Eastside (NESCO)	60.0	24.4	6.7	6.7	2.2	0.0	45
Northwest Dane	72.7	12.1	15.2	0.0	0.0	0.0	33
Senior Citizens of Belleville, Exeter, Montrose	71.0	22.6	6.5	0.0	0.0	0.0	31
South Madison (SMCE)	70.3	20.9	6.6	0.0	1.1	1.1 ¹⁷	91
Village of McFarland	64.3	14.3	7.1	7.1	0.0	7.1 ¹⁸	14
Village of Mount Horeb (SW Dane)	76.5	23.5	0.0	0.0	0.0	0.0	34
Village of Oregon	88.0	8.0	4.0	0.0	0.0	0.0	25
Village of Waunakee	82.4	16.2	0.0	1.4	0.0	0.0	74
West Madison (WMSC)	74.3	11.4	5.7	2.9	2.9	2.9 ¹⁹	35

¹⁵ 1 person indicated 6 – Awful.

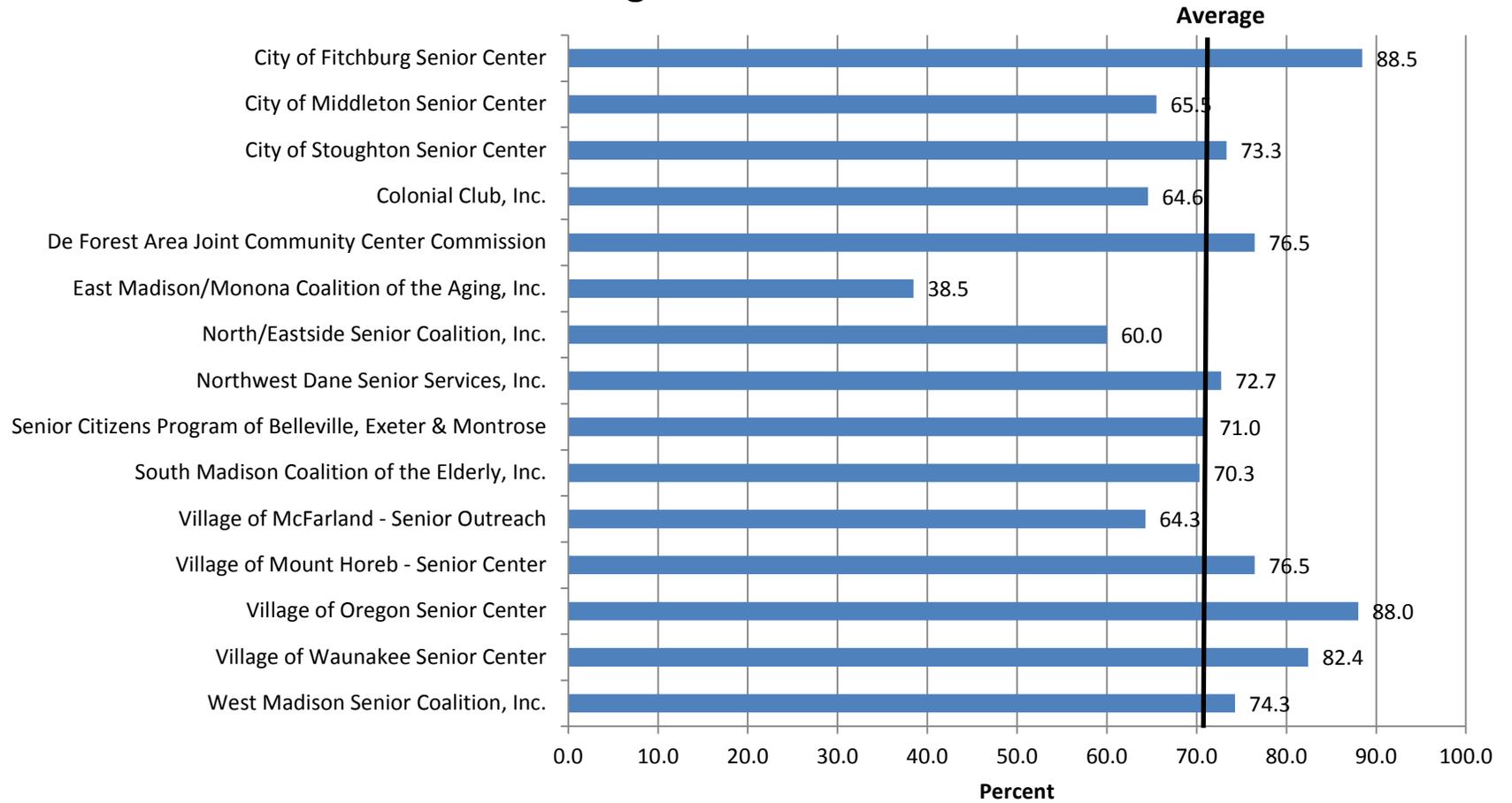
¹⁶ 1 person indicated fair to good.

¹⁷ 1 person indicated fair to good.

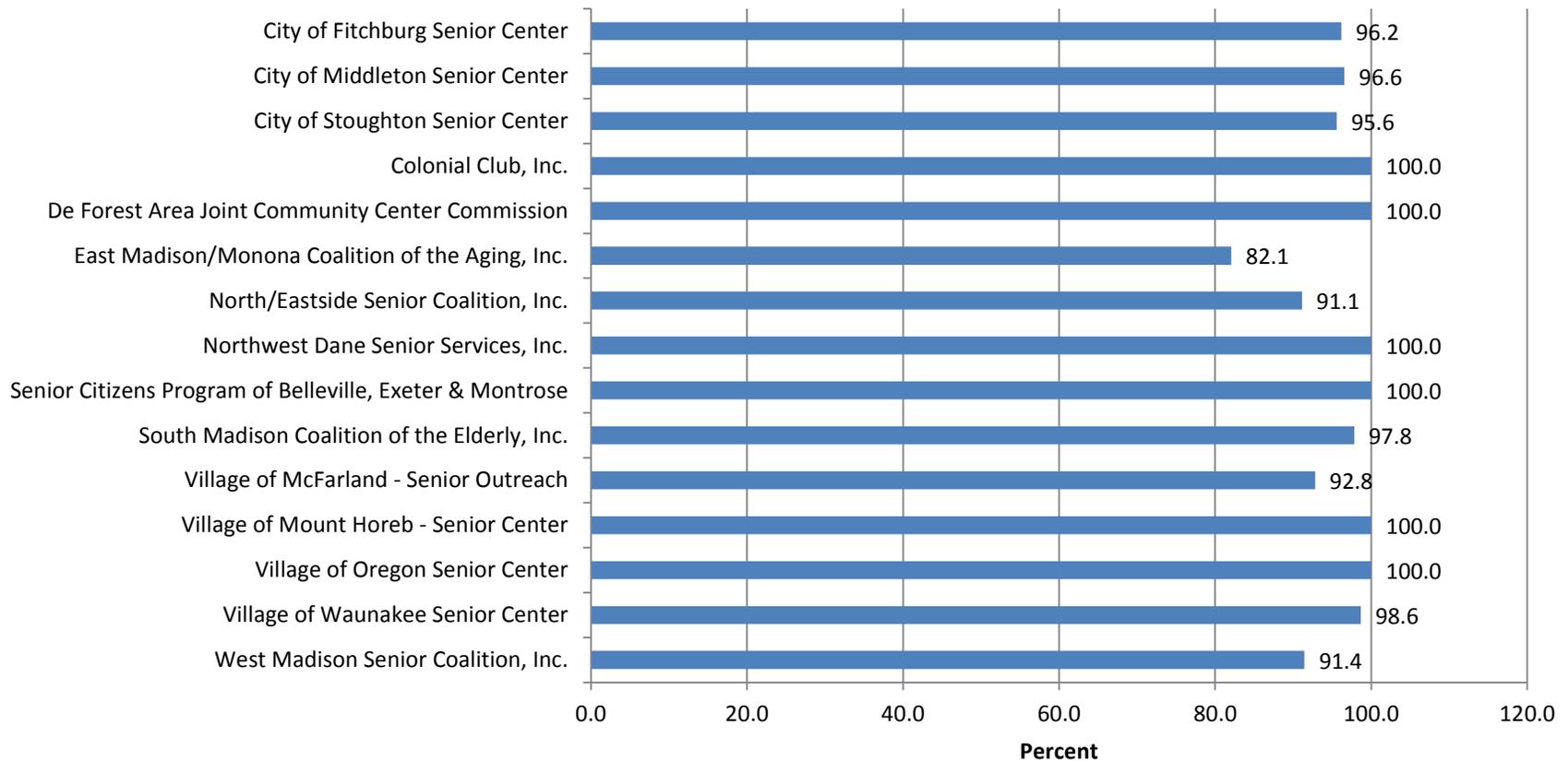
¹⁸ 1 person indicated excellent to very good.

¹⁹ 1 person indicated fair to poor.

Percent of Survey Respondents by Agency Rating the Overall Quality of Case Management Services as Excellent



Percent of Survey Respondents by Agency Rating the Overall Quality of Case Management Services as Excellent, Very Good, or Good



Appendix A: Survey Instrument



Case Management Survey

Introduction: We need your help! Dane County Department of Human Services is always interested in improving the services we help to fund. We would like to know what you think about the case management services you have received in 2014 from the **«Agency»** that are provided by **«Name_of_Primary_Case_Manager_First_Name»**. Your case manager is the person who helps to coordinate services, such as transportation, personal care services, home delivered meals, and more for you.

This survey is completely confidential. You do not have to complete it if you don't want to, but we hope you will help us out. How you answer the questions will not impact your services in any way. The results of this survey will be released in aggregate form only. That means your answers will be grouped together with those of other people who have responded to this survey.

Please return your completed survey in the enclosed, postage paid envelope no later than **Friday, October 31, 2014**.

**1. Which services does your case manager help to coordinate for you?
(Check all that apply)**

- | | YES | |
|--|--------------------------|---|
| a. Adult Day Services..... | <input type="checkbox"/> | 1 |
| b. Energy Assistance..... | <input type="checkbox"/> | 1 |
| c. Food Assistance/Food Stamps/SNAP..... | <input type="checkbox"/> | 1 |
| d. Home Chore Services..... | <input type="checkbox"/> | 1 |
| e. Home-Delivered Meals..... | <input type="checkbox"/> | 1 |
| f. Homemaker / Housekeeper..... | <input type="checkbox"/> | 1 |
| g. Housing Assistance..... | <input type="checkbox"/> | 1 |
| h. Information and Assistance..... | <input type="checkbox"/> | 1 |
| i. Legal Assistance..... | <input type="checkbox"/> | 1 |
| j. Medicare / Medicaid..... | <input type="checkbox"/> | 1 |
| k. Medication Management..... | <input type="checkbox"/> | 1 |
| l. Personal Care Services..... | <input type="checkbox"/> | 1 |
| m. Transportation..... | <input type="checkbox"/> | 1 |
| n. Other..... | <input type="checkbox"/> | 1 |

List: _____

2. Do you know how to contact your case manager when you need to?

- | | | |
|----------|--------------------------|---|
| Yes..... | <input type="checkbox"/> | 1 |
| No..... | <input type="checkbox"/> | 2 |

- | | Always | Sometimes | Never |
|--|----------------------------|----------------------------|----------------------------|
| 3. Does your case manager return your phone calls in a timely manner?..... | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| 4. Does your case manager explain your services in a way you can understand?..... | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| 5. Does your case manager treat you with respect?..... | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| 6. Does your case manager involve you in discussing and planning your services?..... | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |
| 7. Does your case manager do a good job setting up services (transportation, meals, medical appointments, etc.) for you?..... | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 |

8. Use the space below to write in any other comments you have about your case manager.

9. Does your case manager help you get services that you did not have before?
 Yes..... 1
 No..... 2
10. Are you able to select the services you receive?
 Yes..... 1
 No..... 2
11. As a result of receiving the case management services, do you have a better idea of where to get information about other services?
 Yes..... 1
 No..... 2
12. Is your situation better because of your case manager's help?
 Yes..... 1
 No..... 2

13. How has the case management service helped you?

14. What recommendations do you have for improving the case management services?

15. Are you satisfied with the case management services you receive?

Yes..... 1
No..... 2

16. Do the case management services help you continue to live at home?

Yes..... 1
No..... 2

17. How would you rate the overall quality of the case management services you have received? Would you say....

Excellent..... 1
Very Good..... 2
Good..... 3
Fair..... 4
Poor..... 5

18. Please use the space below for any other comments you have about your case management services.

Thank you for taking the time to complete this survey! Please return it in the enclosed envelope to:

Dane County Department of Human Services
1202 Northport DR/4th FL
Madison, WI 53704

Survey No.

