



Survey of Case Management Services for Older Adults in Dane County

January 1, 2019 – August 31, 2019



March 2020

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 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 12 geographically-based senior focal points.

Case management services are funded primarily by Dane County General Purpose Revenue (GPR). A small amount of 2019 funding (\$10,000) came from State Health Insurance Assistance Program (SHIP) funds which are federal dollars from the Centers for Medicare and Medicaid Services (CMS), passed through the Wisconsin Department of Health Services (DHS) to counties to provide outreach to low-income older adults for assistance with issues involving Medicare/Medicaid, enrollment in assistance programs

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>

to help off-set the cost of Medicare premiums (like LIS – Low Income Subsidy or Extra Help), and any other issue related to Medicare. In Dane County, these dollars are used to provide this outreach through five (5) 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.

II. Study Purpose

The purpose of the survey was to measure client satisfaction of case management services with the goal of using this input to improve program efficiency and ensure the program is effectively helping older adults.

III. Data Collection

Measures

The mail version of the Case Management Survey of the Administration on Aging (AoA), Performance Outcome Measures Project (POMP), available at: http://www.aoa.acl.gov/Program_Results/POMP/CaseManagement.aspx, as updated in 2008 and available from the Administration for Community Living (ACL), AGing Integrated Database (AGID) served as the base instrument. That instrument 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/> from ACL.

The Case Management Survey examines the services that were provided, the recipients' satisfaction with those services, and the ways they have been helpful.

The 2019 DCDHS version of the survey differed from the ACL survey by:

- Including the program and case manager name in the introduction.
- Not including a question inquiring about the last time that case management services were received.
- Retaining the list of services coordinated, but updating for Dane County from prior versions of the AoA survey.
- Using the phrasing, “Is your situation better because of your case manager’s help?” rather than the ACL phrasing of “Has your situation improved because of the services your case manager arranges?”
- Retaining the question, “Are you satisfied with the case management services you receive?” from prior versions of the AoA survey.
- Adding a question regarding whether the person completed the survey on his/her own or if someone assisted him/her.
- Revising the question regarding whether case management services helped the individual to continue to live at home to whether the case management services helped the individual continue to live where they chose.
- Adding space for open-ended comments for improving the case management services and for additional comments about their case manager or case management services.
- Used the response category of “Rarely” from prior ACL versions rather than “Seldom” for some service quality items.

The final survey included 21 items; it may be found in Appendix A.

Translation

The survey was made available in Spanish and designed so that the form had both English and Spanish versions side-by-side.

All agencies were asked to indicate which of their clients were to receive a Spanish version of the survey. A total of twelve (12) clients were identified by NewBridge Madison, which has a contract for bilingual case management services for older adults in Dane County, and by Fitchburg Senior Center. Of those, eight (8) were randomly selected to receive the Spanish/English versions of the mailed surveys.

Survey Population

The survey population was all clients who received case management services between January 1, 2019 and August 31, 2019. Persons whose cases were closed as they were deceased or had moved out of the service area were excluded.

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, 2019, and August 31, 2019, and who were reported into the DCDHS Information System. This was generated on September 9, 2019 as an Excel spreadsheet. This was unduplicated by program, then by client in recognition that clients may have received case management services from more than one agency during the study period due to moving from one service area to another.

The next step was to ensure 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 providing services. These were sent September 9, 2019 to Cheryl Batterman, Area Agency on Aging (AAA) Manager, for distribution to agencies along with instructions to result in:

- Recording the name of the case manager with whom the client was most familiar. This was in a first name then last name format so that it read Jane Doe (for example) when the mail merge was to be made.
- Reviewing the address shown for each client and making any needed revisions directly on the spreadsheet.
- Adding missing addresses to the spreadsheet.
- Adding missing client names to the spreadsheet.
- If anyone was deceased, recording the date of death (as close to the date as possible) to avoid inadvertent delivery of a survey form.
- Indicating whether the individual needed a survey in Spanish.
- Having completed spreadsheets returned by Friday, September 20, 2019.

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

The majority of the spreadsheets were returned on or by the September 20 deadline with the final one arriving October 4. In reviewing the lists, it appeared they were updated to include clients served through August 30, 2019.

The data from spreadsheets were updated into a “master” spreadsheet that was “cleaned.” Agencies that indicated a client from the originally sent spreadsheet was not to be sent a survey were asked to “justify” the reason.

Of the original 2,194 rows of clients, 225 were cut, most frequently due to the individual being deceased. 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	70	31.1
Not currently serving	2	0.9
Only received Medicare Part D Services	23	10.2
Moved out of County, State, or Service Area	21	9.3
Moved to a Nursing Home	6	2.7
Moved to Assisted Living Facility	14	6.2
Moved to another Facility (includes Hospice, Rehab)	15	6.7
No valid address, unsure of address	44	19.6
Agency request (dementia (2); potential distress (3))	5	2.2
No case manager identified	10	4.4
Other Reasons (Care Wisconsin client (10); I-Care Client (1); other case management client (1); short-term services (3))	15	6.7
Total	225	100.0

Random Sampling Method

The RAND function in Excel was used to generate a random number for each row in the spreadsheet. These were then arranged from the smallest to the largest with the first 1,500 then being included in the survey mailing.

Two surveys were later excluded. One would have resulted in the individual receiving two surveys. The other individual passed prior to the survey mailing.

Survey Method

A total of 1,498 survey forms were mailed October 18, 2019. Envelopes were stuffed by Bonnie Wahrer, a Limited Term Employee, brought in to assist with the mailing.

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

Survey forms returned with bad addresses with forwarding addresses indicated were re-mailed until two weeks prior to the final due date. The exception was if a mailing address was outside Dane County, the survey form was not re-mailed. Of the 172 forms returned with bad addresses, 87 were re-mailed.

The number mailed and those that presumably made it to clients by agency may be found in Table 2 on the following page.

Client Confidentiality

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

Each survey form had a 3-4 digit tracking number associated with it that was linked with demographics of the potential respondent. This was to keep from asking clients information already known to the Department and to reduce the length of the survey.

Table 2: Surveys by Disposition by Agency

Agency	Surveys Mailed	Returned with Bad Addresses and Not Re-mailed	Surveys to Clients
Colonial Club Senior Activity Center	95	3	92
DeForest Area Community & Senior Center	54	0	54
Fitchburg Senior Center	82	4	78
McFarland Senior Outreach Services	78	2	76
Middleton Senior Center	52	2	50
NewBridge Madison	636	53	583
Northwest Dane Senior Services	73	4	69
Oregon Area Senior Center	72	1	71
Southwest Dane Senior Outreach	63	5	58
Stoughton Area Senior Center	88	3	85
Sugar River Senior Center	70	3	67
Wauwaukee Senior Center	135	5	130
Total	1,498	85	1,413

Response Rate

The overall response rate was 29.9%; 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. Sugar River Senior Center had the lowest response rate at 19% while Wauwaukee Senior Center had the highest response rate at nearly 44%.

Sample of Comments From Surveys That Were Excluded

I was never contacted.

I haven't needed services for quite some time. But, [Case Manager] was very good.

We have not needed [Case Manager] services for a few years - when we did [Case Manager] was very helpful.

I needed help with shoveling out my car in the winter last year. [Case Manager] was unable to help me. That's all we did. I can't fill out this form for anything else.

Not used. Seen once - no money.

I do not have a case manager. I work at a senior lunch program and I help deliver Meals on Wheels.

I take care of myself which is better. I don't trust the agency anymore.

I met [Case Manager] back a while ago but at that time I didn't ask for help. Things are changing.

Table 3: Response Rate by Agency

Agency	Surveys to Clients	Surveys Returned	Surveys Excluded	Useable Surveys	Response Rate
Colonial Club Senior Activity Center	92	32	3	29	31.5
DeForest Area Community & Senior Center	54	18	0	18	33.3
Fitchburg Senior Center	78	28	4	24	30.8
McFarland Senior Outreach Services	76	30	3	27	35.5
Middleton Senior Center	50	23	3	20	40.0
NewBridge Madison	583	160	31	129	22.1
Northwest Dane Senior Services	69	32	3	29	42.0
Oregon Area Senior Center	71	38	9	29	40.8
Southwest Dane Senior Outreach	58	21	5	16	27.6
Stoughton Area Senior Center	85	30	0	30	35.3
Sugar River Senior Center	67	21	7	13	19.4
Waunakee Senior Center	130	73	16	57	43.8
Total	1,412	506	84	422	29.9

Of the 84 survey forms shown in Table 3 as excluded for analysis:

- 21 received Medicare Part D services only
- 51 had no services listed as being received
- 12 do not answer any questions beyond the first question which asked about the services received.

For the English/Spanish surveys, one (1) of the eight (8) that were mailed was returned due to a bad address. None of the remainder were returned.

Datasets

Two datasets were used in this analysis.

Due to the range of response rates and to reflect the overall status of the program, a random sample of 296 surveys was pulled. A sample size of 327 was required for a confidence level of 95% but this was limited to 296 by the lower response rate of NewBridge Madison and Sugar River Senior Center; thus the confidence interval (margin of error) was ± 5.3 rather than the desired ± 5 .

Pulling the random sample from the 422 useable survey forms was accomplished by sorting the returned forms by Agency, then by survey number. The RAND function in Excel was used to generate a random number for each row in the spreadsheet. These were sorted by Agency, then by random number from the smallest to the largest. The number of surveys pulled by Agency was based on the percent of clients to the overall total. This was used for the bulk of this report. Table 4 indicates the distribution of the surveys that were included in the overall program analysis.

The second dataset used for the analysis by individual agency, found at the end of this report in the section on Results by Contracted Agency, uses the 422 returned useable survey forms.

Table 4: Surveys to be Included in Sample for Overall Analysis by Agency

Agency	Number of Clients Served	Percent of Clients Served	Number of Surveys to Be Included for Overall Analysis
Colonial Club Senior Activity Center	141	6.4	19
DeForest Area Community & Senior Center	83	3.8	11
Fitchburg Senior Center	116	5.3	16
McFarland Senior Outreach Services	114	5.2	15
Middleton Senior Center	87	4.0	12
NewBridge Madison	872	39.7	118
Northwest Dane Senior Services	96	4.4	13
Oregon Area Senior Center	111	5.1	15
Southwest Dane Senior Outreach	93	4.2	12
Stoughton Area Senior Center	163	7.4	22
Sugar River Senior Center	104	4.7	14
Waunakee Senior Center	214	9.8	29
Total	2,194	100.0	296

IV. Findings

Data were 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
- Municipalities
- Services Coordinated
- Participation in Service Planning
- Service Quality
- Satisfaction
- Overall Quality
- Benefits
- Recommendations for Improvement
- Results by Contracted Agency – includes all survey results, not just those from the random sample.

Briefly, some of the findings include:

- Survey respondents indicated their case managers treated them with respect (96%), returned their telephone calls in a timely manner (89%), explained services in a way they could understand (94%), and involved them in discussing and planning their services (87%).
- Slightly less than half (45%) of the respondents indicated their case manager developed a care plan for the services they needed; however, the majority (79%) of those indicated they received a copy of the care plan.
- Persons of Color were significantly less likely than Whites to indicate their case manager treated them with respect, returned their phone calls in a timely manner, and explained services in a way they could understand.

- In examining benefits of case management services, survey respondents indicated their case managers helped them get services they did not have before (78%), their situations were better because of their case managers' help (90%), and the case management services helped them continue to live where they chose (88%).
- Persons of Color were significantly less likely than Whites to indicate that as a result of the case management services their situation is better because of their case manager's help, that the services help the continue to live where they choose, and that they have a better idea of where to get information about other services.
- Overall, 93% of survey respondents were satisfied with the case management services they received.

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 January 8, 2020 were included in the data analysis. Surveys returned after that date were excluded.
- The number of questions that were missed by respondents either by being skipped or by omitting a page, led to the decision to analyze data based on the number of respondents for each question rather than using the total number of survey respondents, which is the usual methodology.

VI. Future Studies

Suggestions for future studies include:

- Examine methods to increase the response rate among Persons of Color and Spanish speakers or find other methods to gather their feedback regarding this service. Some possibilities may include conducting outreach efforts prior to the next survey and/or conducting focus groups in settings that are comfortable for each population.

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 (AAA) Board of Directors
- General public via posting on the AAA website

Additionally,

- Comments attributable to individual Senior Focal Points will be shared with them.
- The survey instrument and/or methodology will be revised to address any issues raised in the section of this report on future studies.
- A 1-2 page synopsis of the report will be developed.

Demographics

During the period of January 1, 2019, through August 31, 2019, 2,194 unduplicated clients received Dane County funded case management services.

Survey respondents in the sample used for the overall program analysis were representative of clients served during the study period in terms of gender, race/ethnicity, age group, and generation.

While 70% of the respondents in the overall sample were female compared with 66% of those who received services during the study period, this was not statistically significant.²

As shown in Table 5, respondents were more likely to be White (91%) than clients served during the study period (88%), although this was not statistically significant.³

Case management clients ranged in age from 56 to over 100. Persons must be age 60 and older to be eligible for this service. This discrepancy has been addressed by the Area Agency on Aging Manager with agencies who served those under age 60.

Table 5: Demographics of Survey Respondents in the Sample Used for Overall Program Analysis Compared with Case Management Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Characteristic	Clients Served		Surveys Mailed		Respondents in Sample of 296	
	No.	Percent	No.	Percent	No.	Percent
Gender						
Female	1,439	65.6	984	65.7	208	70.3
Male	750	34.2	510	34.0	88	29.7
Unknown	5	0.2	4	0.3	0	0.0
Total	2,194	100.0	1,498	100.0	296	100.0
Race/Ethnicity						
Asian	19	0.9	12	0.8	0	0.0
Af. Amer/Black	162	7.4	115	7.7	19	6.4
Hispanic/Latinx	64	2.9	49	3.3	4	1.4
Native American	8	0.4	4	0.3	1	0.3
Pacific Islander	1	0.0	1	0.1	0	0.0
White	1,922	87.6	1,299	86.7	270	91.2
More than 1 Race	6	0.3	6	0.4	1	0.3
Unknown	12	0.5	12	0.8	1	0.3
Total	2,194	100.0	1,498	100.1 ⁴	296	99.9 ⁵
Age in 2019						
<60	13	0.6	12	0.8	2	0.7
60-64	181	8.2	116	7.7	18	6.1
65-69	352	16.0	252	16.8	49	16.6

² $\chi^2 = 2396625$, $df=1$, $p<.05$

³ $\chi^2 = 5.656311$, $df=5$, $p<.05$

⁴ Does not equal 100% due to rounding.

⁵ Does not equal 100% due to rounding.

The majority of clients served during the study period were aged 70-74 (17%) as were respondents (17%).

The Silent Generation born 1929-1945, comprised 51% of the clients served and 55% of respondents included in the sample.

Table 5: Demographics of Survey Respondents in the Sample Used for Overall Program Analysis Compared with Case Management Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Characteristic	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
70-74	369	16.8	261	17.4	51	17.2
75-79	332	15.1	235	15.7	45	15.2
80-84	341	15.5	219	14.6	49	16.6
85-89	315	14.4	204	13.6	43	14.5
90-94	215	9.8	147	9.8	28	9.5
95-99	67	3.1	46	3.1	11	3.7
100+	9	0.4	6	0.4	0	0.0
Total	2,194	99.9 ⁶	1,498	99.9 ⁷	296	100.1 ⁸
Generation (Years Born)⁹						
Baby Boomer (1946-1964)	840	38.3	595	39.7	106	35.8
Silent (1929-1945)	1,122	51.1	748	49.9	163	55.1
Greatest (1900-1928)	232	10.6	155	10.3	27	9.1
Total	2,194	100.0	1,498	99.9 ¹⁰	296	100.0

⁶ Does not equal 100% due to rounding.

⁷ Does not equal 100% due to rounding.

⁸ Does not equal 100% due to rounding.

⁹ Scholars and the literature differ as to the exact dates for each generation. The sources for these categories include the Pew Research Centers and Michael T. Robinson's "What Generation Are You?" found on Career Planner.

¹⁰ Does not equal 100% due to rounding.

Persons who were relatively new to case management services were less likely to respond to the survey. Around 16% of the respondents in the overall sample served during the study period received case management services for less than 6 months contrasted with 27% of the clients served. Respondents in the overall sample were not representative of clients served during the study period in terms of length of time receiving case management services.¹¹

Table 5: Demographics of Survey Respondents in the Sample Used for Overall Program Analysis Compared with Case Management Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Characteristic	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
Length of Time Receiving Case Management Services as of Date Survey Mailed						
< 6 months	590	26.9	399	26.6	47	15.9
6-12 months	748	34.1	524	35.0	128	43.2
13-18 months	155	7.1	93	6.2	17	5.7
19-24 months	112	5.1	80	5.3	13	4.4
25-30 months	87	4.0	57	3.8	13	4.4
31-36 months	87	4.0	59	3.9	13	4.4
37 months+	415	18.9	286	19.1	65	22.0
Total	2,194	100.1 ¹²	1,498	99.9 ¹³	296	100.0

¹¹ $\chi^2 = 20.986$, $df=6$, $p<.05$

¹² Does not equal 100% due to rounding.

¹³ Does not equal 100% due to rounding.

Municipalities

Aaron Krebs, GIS Specialist, with the Dane County Department of Planning and Development identified the municipalities from a list of supplied addresses. Much gratitude is extended for this work. These were associated at the client level by the Senior Program Analyst/Manager.

Clients who received case management services between January 1, 2019 and August 31, 2019, hailed from nearly every municipality in Dane County as seen in Table 6. Of the 61 municipalities, the City of Edgerton, the Town of Christiana, and the Town of York were not represented.

Over half (55%) of all clients served resided in a City with nearly a quarter (24%) living in a Village and 16% hailing from a Town.

The respondents in the sample were representative of the clients served based on overall municipality of city, town, or village.¹⁴

Table 6: Municipalities of Survey Respondents in Sample Compared with Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Municipality ¹⁵	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
Cities	1,202	54.8	850	56.7	176	59.5
Edgerton	0	0.0	0	0.0	0	0.0
Fitchburg	118	5.4	82	5.5	16	5.4
Madison	718	32.7	531	35.4	103	34.8
Middleton	70	3.2	50	3.3	9	3.0
Monona	52	2.4	39	2.6	15	5.1
Stoughton	151	6.9	89	5.9	19	6.4
Sun Prairie	89	4.1	56	3.7	12	4.1
Verona	4	0.2	3	0.2	2	0.7
Towns	348	15.9	235	15.7	46	15.5
Albion	1	0.0	0	0.0	0	0.0
Berry	6	0.3	5	0.3	0	0.0
Black Earth	3	0.1	1	0.1	0	0.0
Blooming Grove	13	0.6	10	0.7	0	0.0
Blue Mounds	9	0.4	5	0.3	1	0.3
Bristol	6	0.3	3	0.2	0	0.0
Burke	4	0.2	3	0.2	0	0.0
Christiana	0	0.0	0	0.0	0	0.0
Cottage Grove	8	0.4	6	0.4	0	0.0
Cross Plains	11	0.5	6	0.4	1	0.3
Dane	3	0.1	1	0.1	0	0.0
Deerfield	3	0.1	3	0.2	0	0.0
Dunkirk	5	0.2	2	0.1	2	0.7

¹⁴ $\chi^2 = 0.414$, $df=2$, $p < .05$

¹⁵ Column totals at the Cities, Towns, and Villages level for percentages will differ slightly due to rounding.

Table 6: Municipalities of Survey Respondents in Sample Compared with Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Municipality	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
Towns						
Dunn	21	1.0	14	0.9	7	2.4
Madison	30	1.4	21	1.4	4	1.4
Mazomanie	10	0.5	8	0.5	0	0.0
Medina	3	0.1	3	0.2	0	0.0
Middleton	1	0.0	1	0.1	0	0.0
Montrose	23	1.0	18	1.2	5	1.7
Oregon	14	0.6	7	0.5	1	0.3
Perry	4	0.2	3	0.2	2	0.7
Pleasant Springs	10	0.5	7	0.5	1	0.3
Primrose	8	0.4	6	0.4	0	0.0
Roxbury	6	0.3	3	0.2	0	0.0
Rutland	12	0.5	11	0.7	3	1.0
Springdale	8	0.4	6	0.4	1	0.3
Springfield	15	0.7	10	0.7	2	0.7
Sun Prairie	2	0.1	2	0.1	0	0.0
Vermont	5	0.2	4	0.3	1	0.3
Verona	16	0.7	9	0.6	1	0.3
Vienna	12	0.5	10	0.7	3	1.0
Westport	76	3.5	47	3.1	11	3.7
York	0	0.0	0	0.0	0	0.0
Villages¹⁶	523	23.8	369	24.6	72	24.3
Belleville	50	2.3	32	2.1	5	1.7
Black Earth	14	0.6	10	0.7	1	0.3
Blue Mounds	6	0.3	4	0.3	3	1.0
Brooklyn	2	0.1	2	0.1	1	0.3
Cambridge	10	0.5	9	0.6	2	0.7
Cottage Grove	22	1.0	17	1.1	2	0.7
Cross Plains	24	1.1	22	1.5	8	2.7

¹⁶ Row totals for Villages will differ slightly due to rounding.

Table 6: Municipalities of Survey Respondents in Sample Compared with Clients Served during the Study Period and with Surveys Mailed (All Unduplicated)

Municipality	Clients Served		Surveys Mailed		Respondents in Sample	
	No.	Percent	No.	Percent	No.	Percent
Villages						
Dane	4	0.2	4	0.3	2	0.7
Deerfield	3	0.1	1	0.1	1	0.3
DeForest	62	2.8	44	2.9	10	3.4
Maple Bluff	1	0.0	1	0.1	1	0.3
Marshall	14	0.6	10	0.7	1	0.3
Mazomanie	12	0.5	8	0.5	2	0.7
McFarland	58	2.6	45	3.0	4	1.4
Mount Horeb	55	2.5	36	2.4	6	2.0
Oregon	81	3.7	53	3.5	11	3.7
Rockdale	0	0.0	0	0.0	0	0.0
Shorewood Hills	1	0.0	1	0.1	0	0.0
Wausaukee	90	4.1	59	3.9	11	3.7
Windsor	14	0.6	11	0.7	1	0.3
Other	121	5.5	44	2.9	2	0.7
Post Office Box	12	0.5	11	0.7	1	0.3
Current address is out of County	56	2.6	17	1.1	1	0.3
Current address is out of state	14	0.6	14	0.9	0	0.0
Homeless	1	0.0	0	0.0	0	0.0
Address is not in DCDHS System or not considered valid by Access Dane or the US Postal Service for geo-coding purposes	38	1.7	2	0.1	0	0.0
Total	2,194	100.0	1,498	99.9 ¹⁷	296	100.0

¹⁷ Will not equal 100% due to rounding.

Services Coordinated

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

Survey respondents indicate their case manager assisted them with just one to over a dozen services.

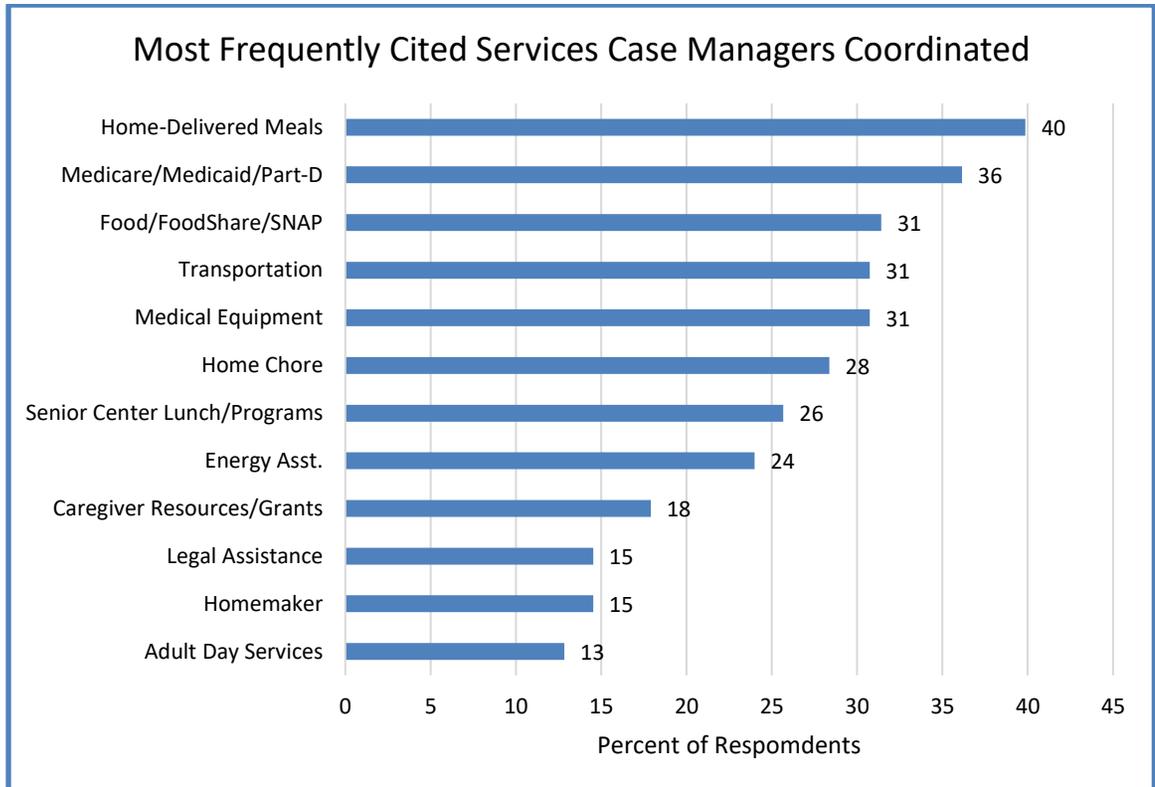
The most frequently cited assistance was helping with receiving home-delivered meals (40%).

Case managers provided assistance with applying for benefits such as energy assistance (24%) and food assistance/ FoodShare/Supplemental Nutritional Assistance Program (31%) that helped to extend one's income.

Services critical to helping persons remain in their own home, such as transportation (31%), medical equipment (31%), and home chore services (28%) were also coordinated.

The category of other included: help with translation services, paperwork, coordination with medical services, holiday food boxes, and serving as a source of information. As one respondent noted, *"Everything I need"* and another, *"Just being there for me."*

Graph 1: Most Frequently Cited Services Coordinated by Case Managers



N = 296. Respondents could cite more than one service.

Contact Case Manager

As seen in Table 7, 94% of survey respondents indicated they knew how to contact their case manager when needed.

However, there were significant differences on this item based on the race/ethnicity, generation, and case management agency of the respondent.

Persons of Color (those with a racial/ethnic background of Hispanic/Latinx, African-American/Black, Native American) were significantly less likely (79%) than those considered White/ Caucasian (95%) to respond “Yes,” they knew how to contact their case manager when needed.¹⁸

Baby Boomers (born 1946-1964) were significantly less likely (88%) than other generations to indicate affirmatively that they knew how to contact their case manager.¹⁹

Table 7: Contact Case Manager

Survey Question	Percent of Respondents		
	Yes	No	Resp. (N)
Do you know how to contact your case manager when you need to?	93.8	6.3	256

Sample of Comments from Survey Respondents

I like the fact that my case manager keeps in touch with me by e-mail and by phone and helps me in person when I deal with third parties.

Very kind and on time to help me every time I call [the Case Manager] on the telephone or in person in the office.

¹⁸ $\chi^2 = 7.375, df=1, p<.05.$

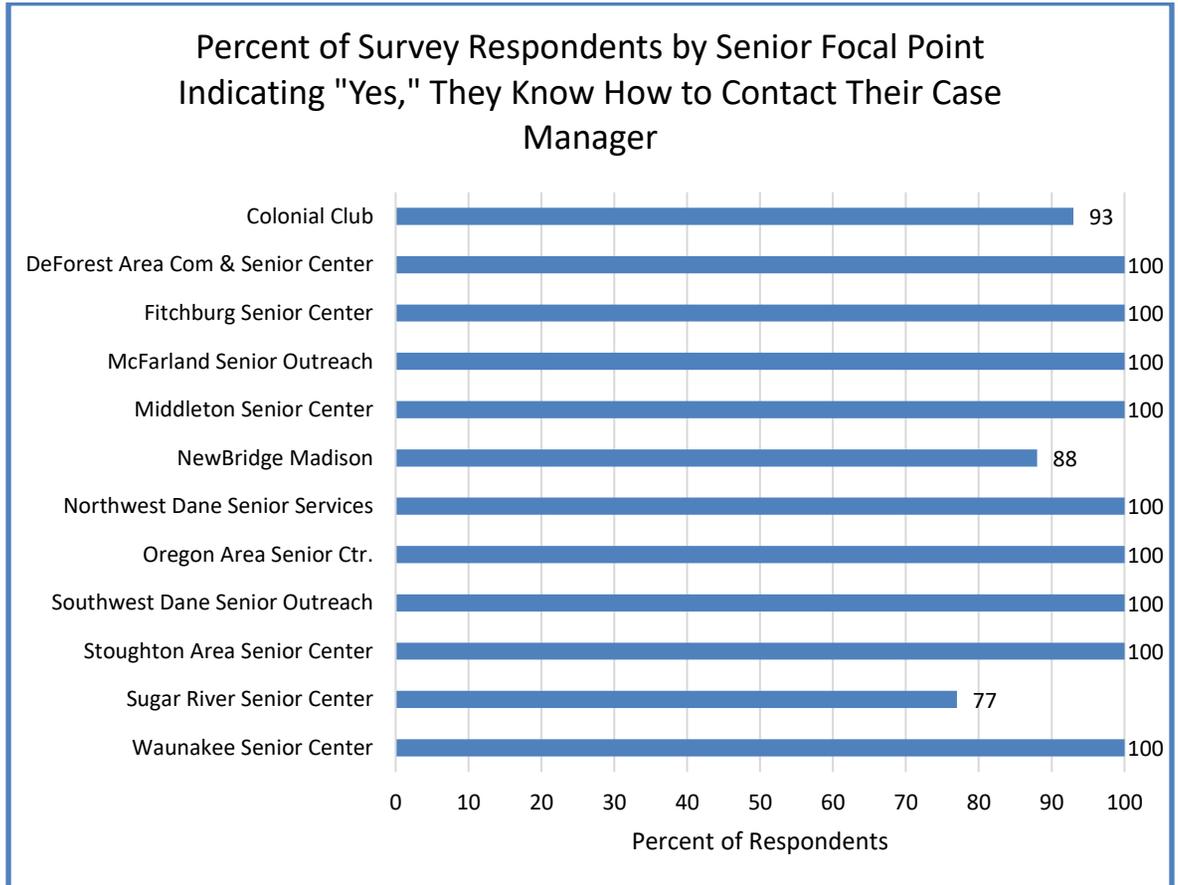
¹⁹ $\chi^2 = 9.083, df=3, p<.05.$

All of the respondents served by nine of the twelve senior focal points indicated they knew how to contact their case manager when they needed. The three exceptions were Colonial Club at 93%, NewBridge Madison at 88%, and Sugar River Senior Center at 77%.

NewBridge Madison which came into existence January 1, 2019 brought together, under a single organization, the four senior coalitions that previously served the cities of Madison and Monona. This change may explain some of the comments from respondents who indicated they did not know how to contact their case manager:

- I have never, never been able to speak to a human being by calling "NewBridge" at (608) 512-0000!!! I enter 1 for English, the first four letters of their name, their extensions, and I get a busy signal and then get hung up on!!!
- I need another case manager.
- I was sent a letter that says my case manager is no longer with New Bridge.
- I didn't realize that I have a case manager until I received this questionnaire. I am delighted to know that! Thank you, ...! How do I get in contact with [my Case Manager]?
- ...I couldn't reach [Case Manager]. I gave up ...

Graph 2: Percent of Survey Respondents by Senior Focal Point Indicating "Yes" to the Item: Do you know how to contact your case manager when you need to?



N = 256.

Participation in Service Planning

Per the 2019 County contracts with agencies, a case management service plan is to be developed when a case is opened for service. The service plan is to be developed with the client, approved by the client, and the client is to be offered a copy of the plan.

A care plan was defined as part of the survey item as, “a document that contains information about who you saw, your needs, the kinds of services you receive, and how you are doing once you receive the services.”

Four items on the survey examined client perception of whether the case manager involved the client in planning the services to be received.

Of the survey respondents, 89% indicated their case managers involved them in discussing and planning their services and 94% indicated they were able to select the services they received.

As seen in Table 8, less than half (45%) of the respondents indicated their case manager developed a care plan for the services they needed. Of those 78% indicated they received a copy of the care plan.

Table 8: Involvement in Service Planning

Survey Question	Percent of Respondents			
	Yes	No	Don't Know	Resp. (N)
Do you and your case manager work together to decide what services you need?	89.0	8.0	3.0	264
Does your case manager involve you in discussing and planning your services?	87.4	7.8	4.8	269
Did your case manager develop a care plan for the services you need?	44.8	24.6	30.6	252
Did you receive a copy of the care plan?	77.8	8.3	13.9	108
Are you able to select the services you receive?	93.6	6.4	0.0	265

Sample of Comments from Survey Respondents

[Case Manager] simply excels. [Case Manager's] manner, ... explanations and is friendly and caring. [Case Manager] has followed up so I continue to receive FoodShare, energy assistance, homestead act which I was not aware of previously.

Very attentive and discussed/planned options.

[Case Manager] has been a god send for me... helped me with numerous services, i.e. paperwork, food share, energy assist., apartment shopping, etc.

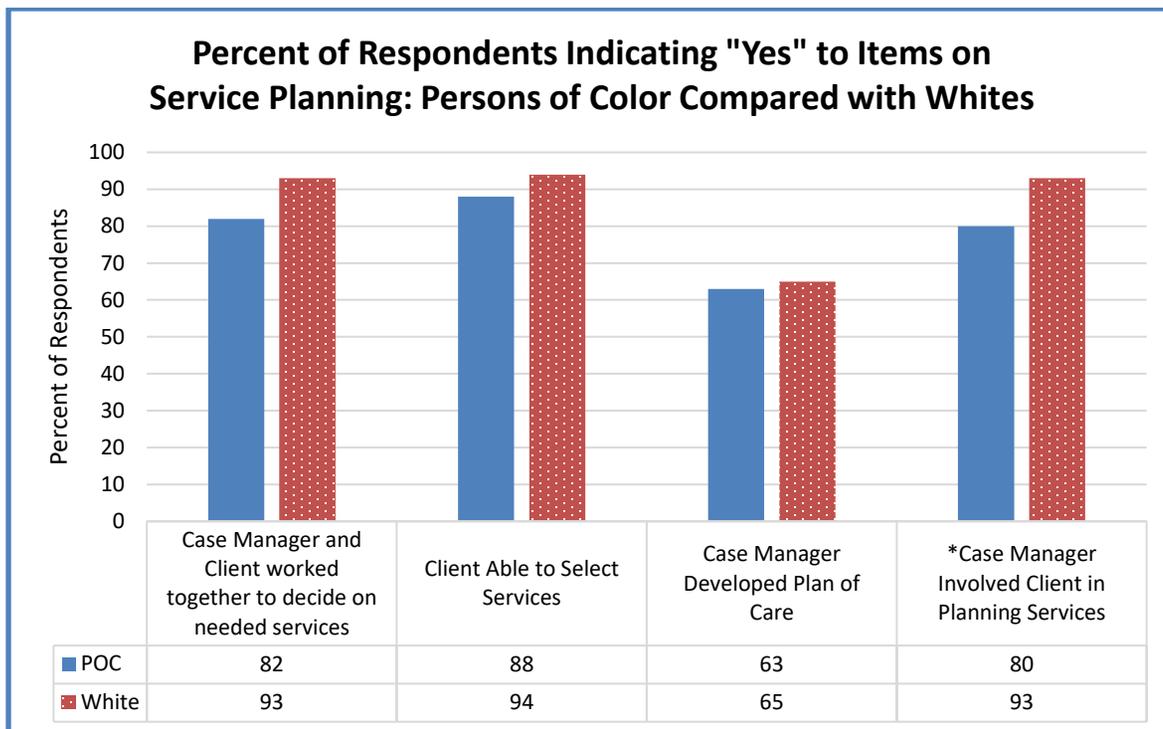
[Case Manager] doesn't do anything.

Case management is good. What is lacking is more services that can be included in the case plan, especially respite services, both short (3-4 days) and long (1-3 weeks) and physical exercise classes for those with mobility impairment.

These items were examined based on gender, race/ethnicity, generation, and senior focal point. The only statistically significant difference was on the basis of race/ethnicity for the involvement of the client in service planning.

As seen in Graph 3, respondents who self-identified as White (93%) were significantly more likely than Persons of Color (80%) to indicate their case manager involved them in discussing and planning their services.²⁰

Graph 3: Percent of Survey Respondents by Senior Focal Point Indicating “Yes” to Items on Service Planning: Persons of Color Compared with Whites



N: Persons of Color (POC) = 22; White = 234 but varies by item.

Asterisk (*) indicates a statistically significant difference.

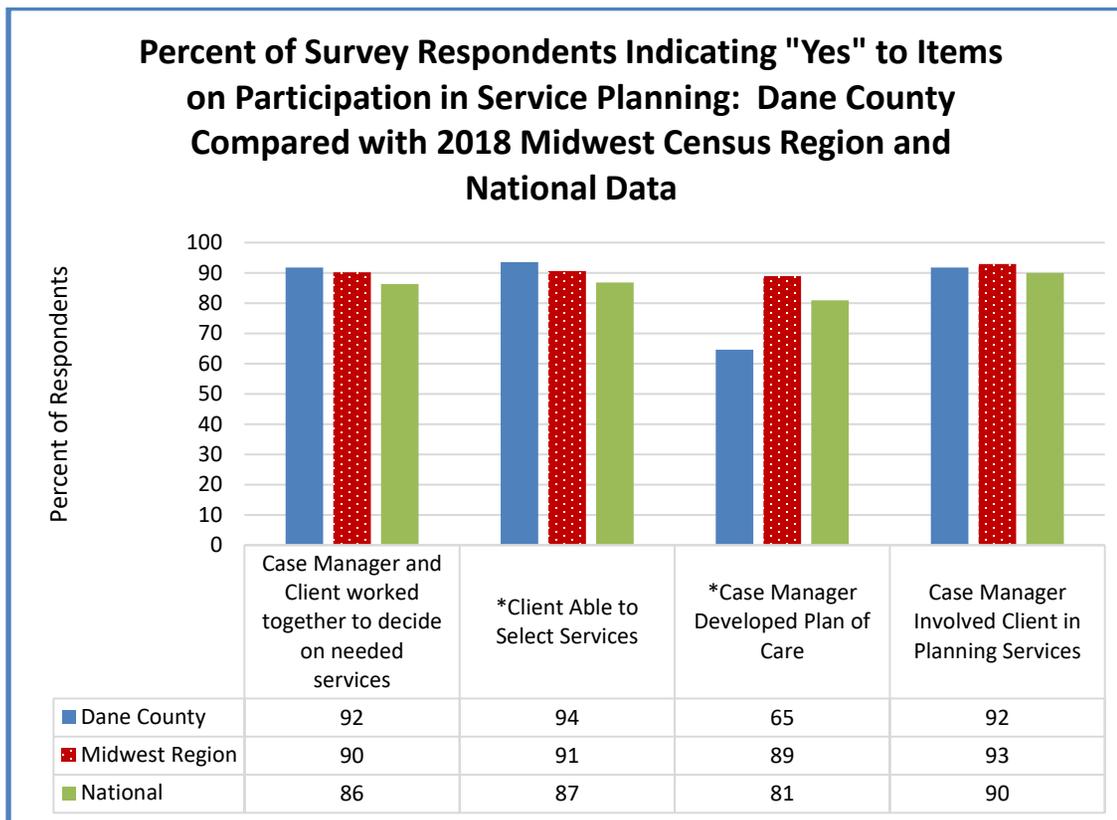
²⁰ $\chi^2 = 3.9401, df=1, p<.05$.

Graph 4 provides a comparison of the Dane County survey results conducted in 2019 with results of the 2018 National Survey of Older Americans Act Participants for the Midwest Census Region - comprised of Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin – and with the national (non-stratified) results. The data is reported by the Administration on Aging via the AGing Integrated Database (AGID); 2018 is the most recent year for which data were compiled at both regional and national levels.

Respondents to the National survey were significantly less likely to indicate they were able to select the services they received than did respondents to the Midwest Census Region and Dane County.²¹

However, Dane County respondents (65%) were significantly less likely than their Midwest Census Region (89%) and National (81%) counterparts to indicate that their case manager developed a care plan for the services they needed.²²

Graph 4: Percent of Respondents Indicating “Yes” to Items Related to Participation in Service Planning: Dane County 2019 Results Compared with 2018 Results for the Midwest Census Region and National Data



Midwest Census Region = Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

Note: In keeping with the response categories of the National survey, these items only examine persons who responded “Yes” or “No” and exclude “Don’t Know” responses.

²¹ $\chi^2 = 7.6588, df=2, p<0.05$.

²² $\chi^2 = 23.2147, df=2, p<0.05$.

Service Quality

Survey respondents rated their case managers highly in treating them with respect (96%), returning their phone calls in a timely manner (89%), and explaining services in a way they could understand (94%).

While the majority of respondents (84%) indicated their case manager did a good job of setting up services for them, this was also the lowest rated item in this section.

Service quality was further examined based on the gender, generation, race, length of time receiving services, and Senior Focal Point for respondents. The data for Dane County was also compared with that available for the Midwest Census region and National data in 2018.

There were no significant differences on the service quality items based on gender.

Baby Boomers (born 1946-1964) at 90% were significantly less likely to indicate that case managers returned their phone calls in a timely manner²³. This compares with 100% of the Greatest generation (1900-1928) and 97% of the Silent generation (1929-1945).

Table 9: Responses to Service Quality Related Questions

Survey Question	Percent of Respondents			
	Yes	No	Don't Know	Resp. (N)
Does your case manager return your phone calls in a timely manner?	89.4	4.6	6.0	284
Does your case manager explain your services in a way you can understand?	94.3	3.2	2.5	283
Does your case manager treat you with respect?	95.5	1.7	2.8	286
Does your case manager do a good job setting up services (transportation, meals, medical appointments, etc.) for you?	84.1	6.5	9.4	246

Sample of Comments from Survey Respondents

Very responsive to phone calls and questions.

Please call me back, as you said you would.

Great help answering my questions.

[Case Manager] is awesome...always able to know or find any info or service that you need or that will make life better.

[Case Manager] is a warm and caring individual. [Case Manager] explains to us what we need and takes care of things for us. [Case Manager] is a real asset to Dane County and is great!

²³ $\chi^2 = 7.661, df=1, p<.05.$

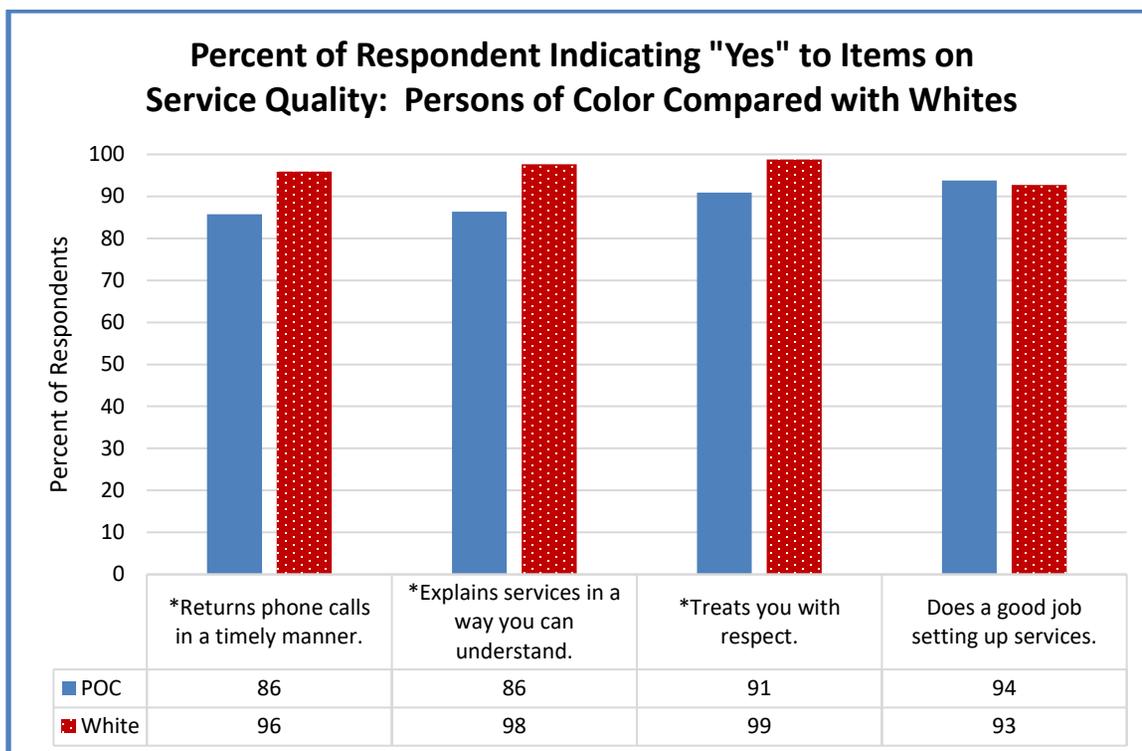
Responses to survey items related to service quality were compared for People of Color (those with a racial/ethnic background of Hispanic/Latinx, African-American/Black, Native American) and those considered White/Caucasian.

Persons of Color, as seen in Graph 5, were significantly less likely than Whites to indicate their case managers returned their phone calls in a timely manner²⁴, explained services in a way they could understand²⁵, or treated them with respect²⁶.

However, Persons of Color (94%) were just as likely as Whites (93%) to indicate their case manager did a good job of setting up services.

Among respondents who received services for less than 6 months, 87% felt that their case manager explained services in a way they could understand. This contrasts with 100% of those receiving services for 13-36 months – a significant difference.²⁷

Graph 5: Comparison of Responses to Items Related to Quality of Services for Persons of Color and Whites



N for Persons of Color = 22 for phone call, 23 for explaining services and treating with respect, and 16 for setting up services. N for Whites = 245 for phone calls, 252 for explaining services, 254 for treating with respect, and 206 for setting up services.

Asterisk (*) indicates a significant difference.

²⁴ $\chi^2 = 3.979, df=1, p<.05.$

²⁵ $\chi^2 = 7.569, df=1, p<.05.$

²⁶ $\chi^2 = 6.719, df=1, p<.05.$

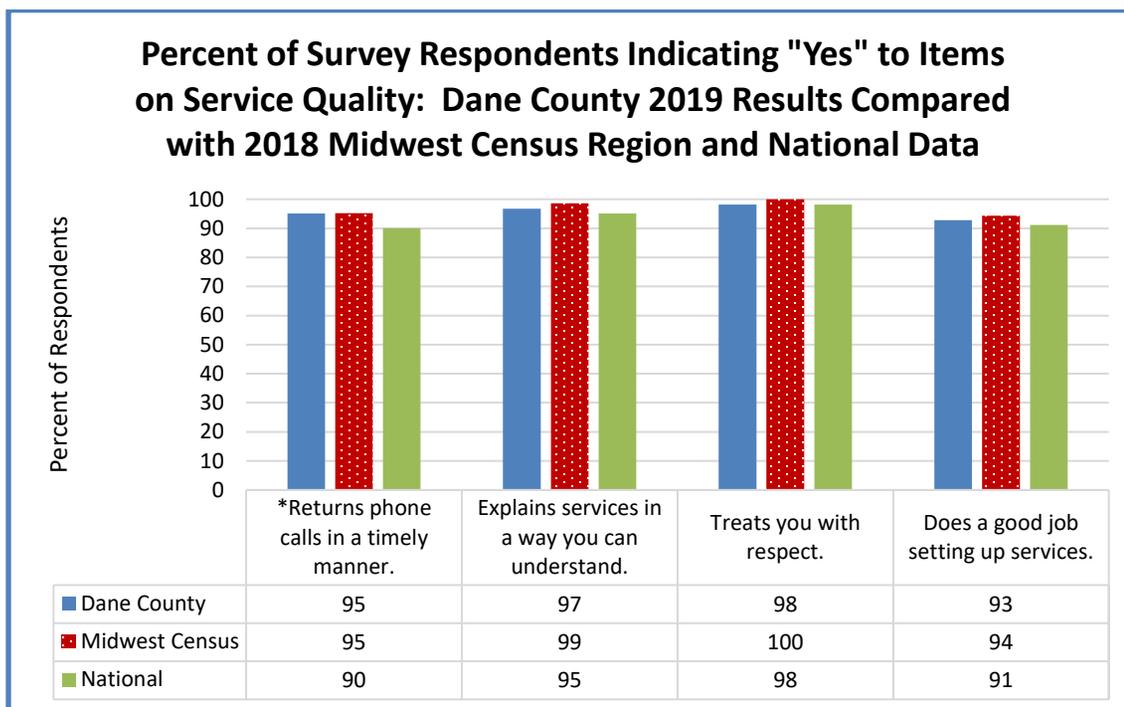
²⁷ $\chi^2 = 13.804, df=6, p<.05.$

Graph 6 provides a comparison of the Dane County survey results conducted in 2019 with results of the 2018 National Survey of Older Americans Act Participants for the Midwest Census Region and with the National (non-stratified) results.

Participants in the National survey were significantly less likely to indicate their case manager returned their phone calls in a timely manner²⁸ than did the Midwest Census Region and Dane County respondents.

Respondents from the Midwest Census Regions were more likely to indicate their case manager explained their services in way they could understand, treated them with respect, and did a good setting up services than did their National counterparts in 2018 and respondents to the 2019 DCDHS survey. However, these differences were not significantly different.

Graph 6: Percent of Respondents Indicating “Yes” to Items Related to Service Quality: Dane County 2019 Results Compared with 2018 Results for the Midwest Census Region and National Data



Midwest Census Region = Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin

Asterisk (*) indicates a significant difference.

Note: In keeping with the response categories of the National survey, these items only examine persons who responded “Yes” or “No” and exclude “Don’t Know” responses.

Caution should be taken in comparing these results due to the different timeframes in which the surveys were administered.

²⁸ $\chi^2 = 6.205, df=2, p<.05.$

Satisfaction

Overall, 93% of survey respondents were satisfied with the case management services they received.

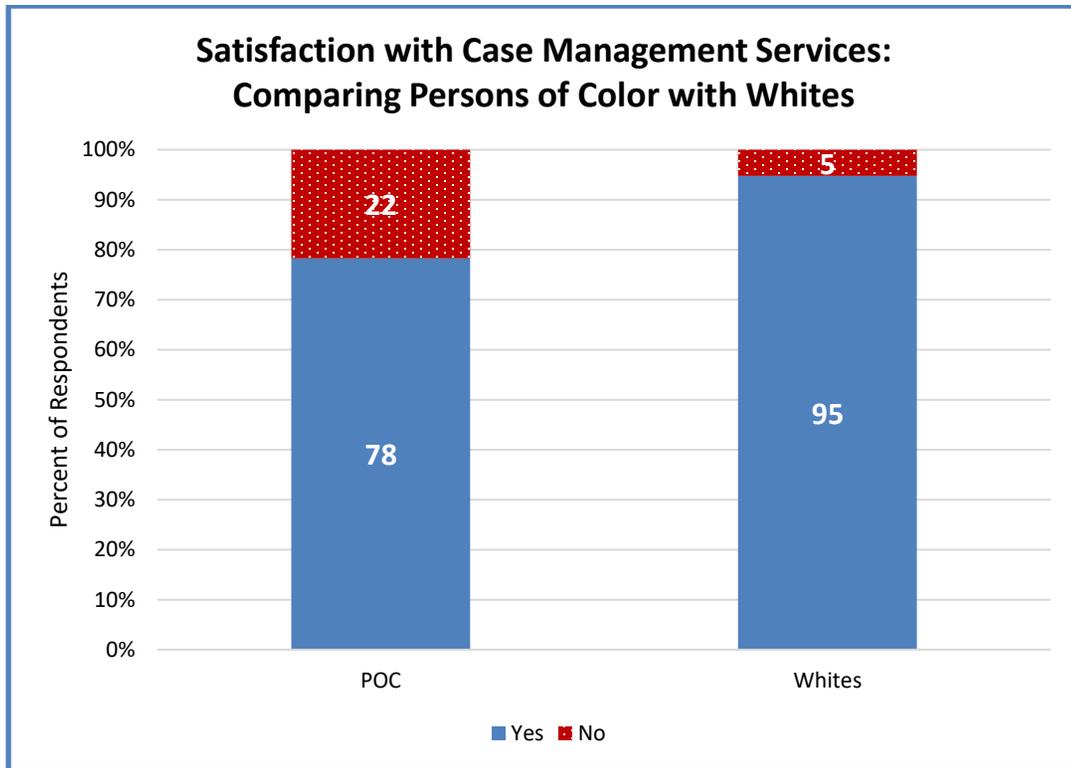
There were no significant differences to this item based on gender, generation, or length of service.

As illustrated in Graph 7, 78% of Persons of Color (those with a racial/ethnic background of Hispanic/Latinx, African-American/Black, Native American) compared with 95% of those considered White/Caucasian indicated “Yes,” they were satisfied with the case management services they receive. This is a significant difference.²⁹

A significant difference in satisfaction was seen among Senior Focal Points. Nine of the twelve, had the distinction of 100% of the respondents to this item indicating they were satisfied with the case management services they received.

Compared to overall respondents, those receiving services from NewBridge Madison (85%) were significantly less satisfied.³⁰

Graph 7: Comparison of Percent of Respondents who Self-Identified as Persons of Color with Whites on Item: Are you satisfied with the case management services you receive?



N = 272.

²⁹ $\chi^2 = 9.296$ $df=1$, $p<.05$.

³⁰ $\chi^2 = 21.073$, $df=11$, $p<.05$.

Overall Quality

Overall, survey respondents rated their case management services quite highly with 63% rating them as Excellent, 24% as Very Good, and 6% as Good.

Slightly less than 8% of the survey respondents rated case management services as fair or poor.

Sample of Comments from Survey Respondents

[Case Manager] is excellent - nothing to improve.

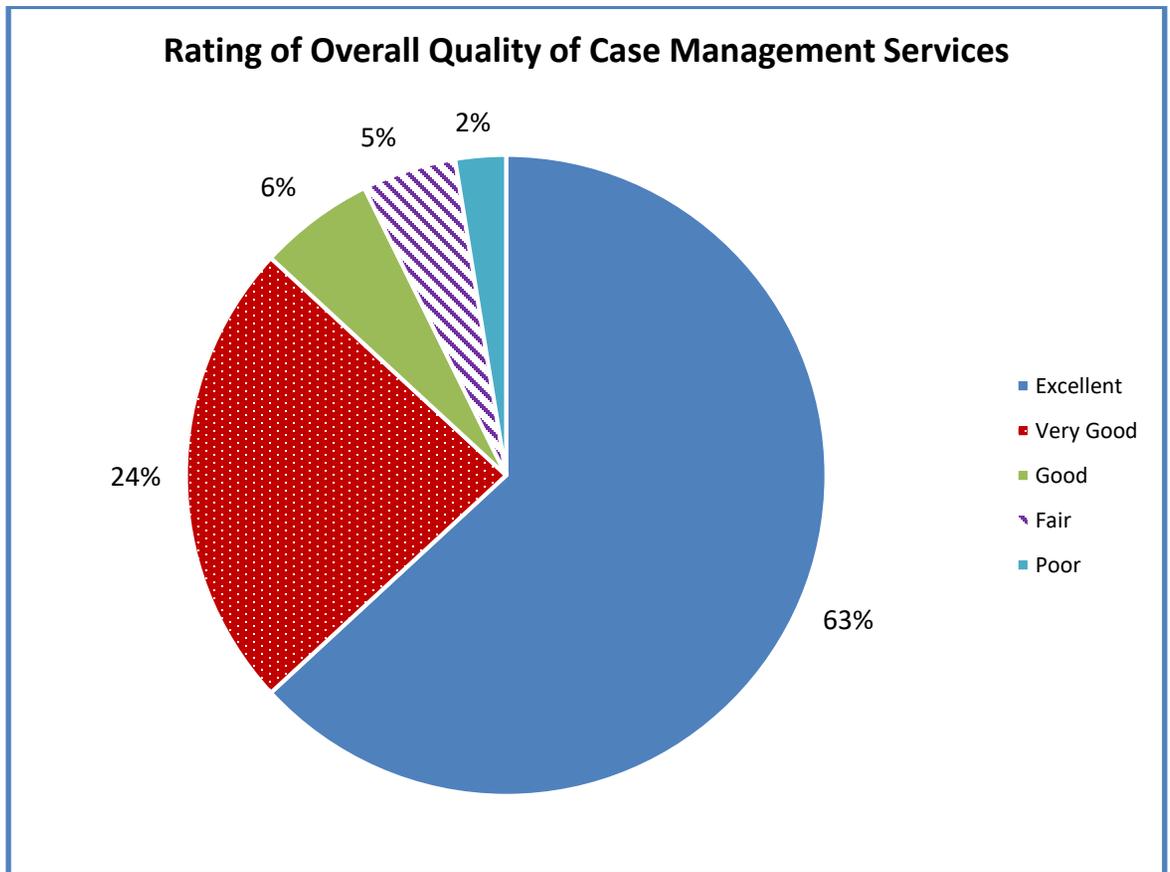
I could not ask for a better case manager. [Case Manager] is very kind and caring! Always helpful.

Excellent! Look forward to working with the next case manager as [Case Manager] has left.

I do not see how it could be better.

[Case Manager] has done an excellent job helping and encouraging me over the years...has helped me a lot.

Graph 8: Overall Quality of Case Management Services by Percent of Respondents

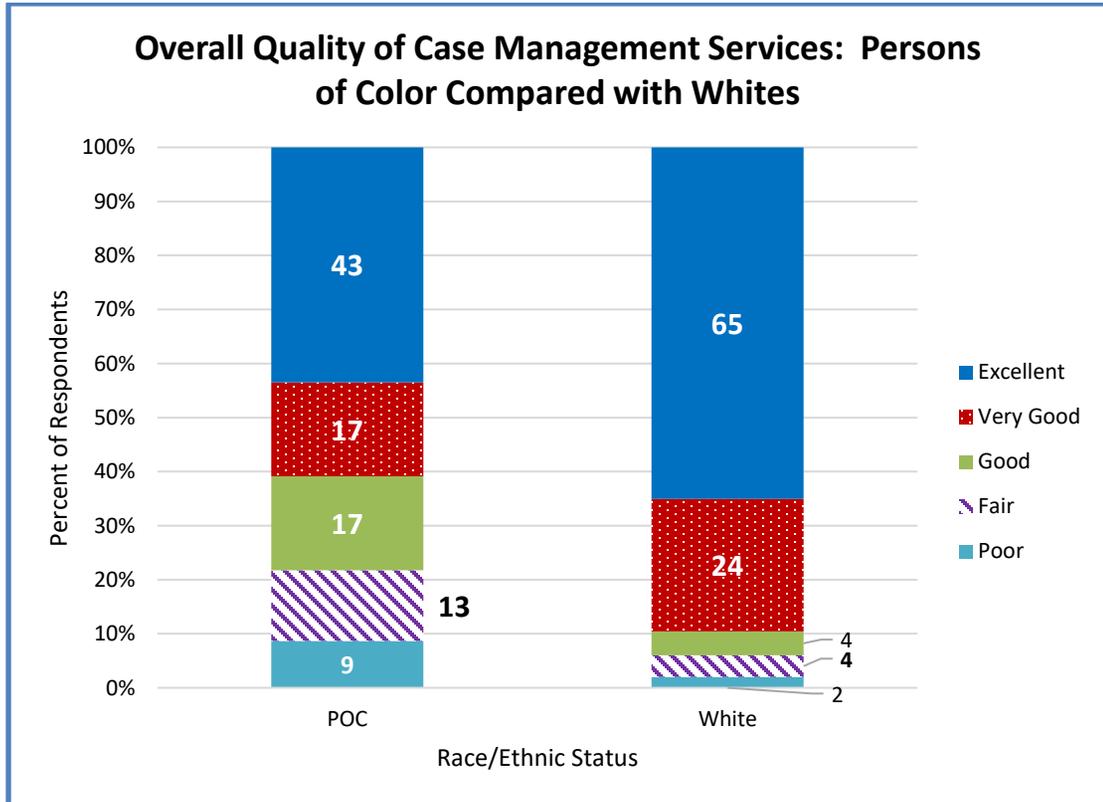


N = 274

There were no significant differences in how respondents rated the overall quality of case management services based on gender, generation, length of time that they had received services, or the Senior Focal Point from which services were received.

There were significant differences, as shown in Graph 9 in how Persons of Color (those with a racial/ethnic background of Hispanic/Latinx, African-American/Black, Native American) perceived the overall quality of case management services compared with Whites/Caucasians.³¹ Overall, 78% of Persons of Color contrasted with 94% of Whites rated the services as Excellent, Very Good, or Good. Persons of Color (22%) were more likely than Whites (6%) to rate the quality of case management services as Fair or Poor.

Graph 9: Comparison of Rating of Overall Quality of Case Management Services Race/Ethnic Status



N = 23 for Persons of Color and 249 for Whites.

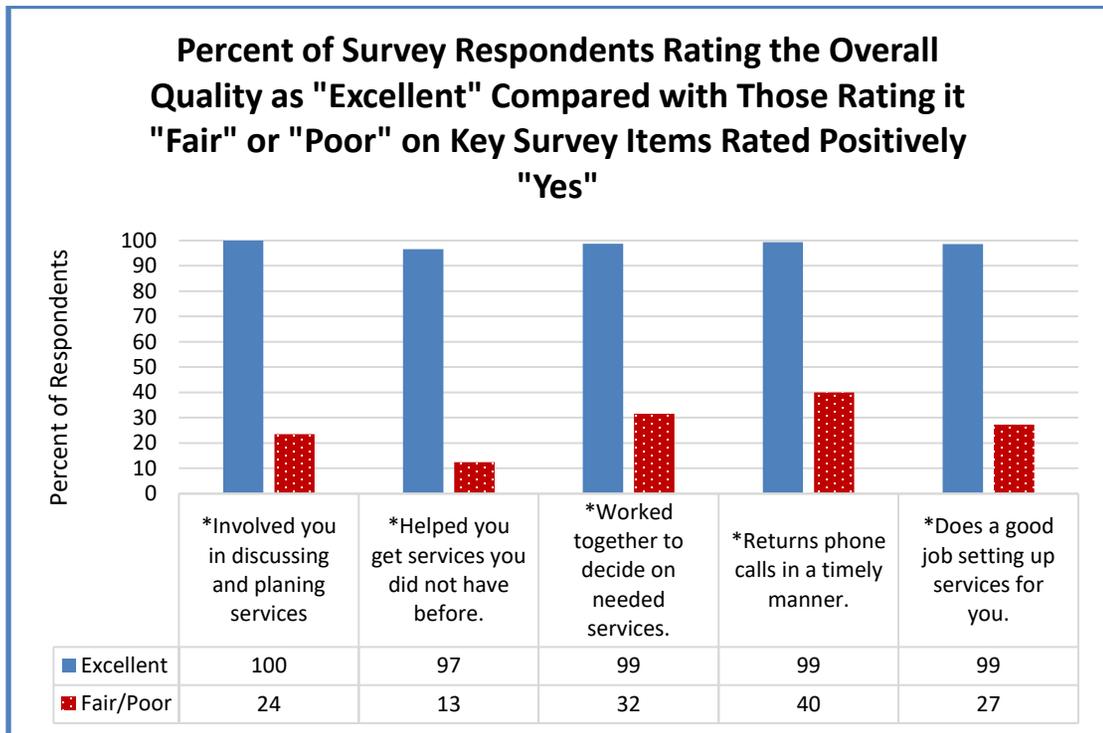
³¹ $\chi^2=15.671, df=4, p<.05$.

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

Respondents who rated the overall quality of case management services as “Excellent” were significantly more likely than those who rated it as “Fair” or “Poor” to indicate their case manager involved them in discussing and planning their services³², helped them get services they did not have before³³, they and their case manager worked together to decide on the services they needed³⁴, their case manager did a good job of setting up services, and returned their phone calls in a timely manner.³⁵

Of those who rated the overall case management services “Excellent,” 77% indicated their case manager developed a care plan for the services they needed contrasted with none of those who rated the services “Fair” or “Poor.”³⁶

Graph 10: Comparison of Overall Quality Rating With Rating of Key Items



N = 165 for overall quality as “Excellent” and N = 18 for overall quality as Fair or Poor. May vary depending on survey item.

Asterisk (*) indicates a statistical significance.

³² $\chi^2=130.519$, $df=1$, $p<.05$

³³ $\chi^2=100.4$, $df=1$, $p<.05$.

³⁴ $\chi^2=96.229$, $df=1$, $p<.05$.

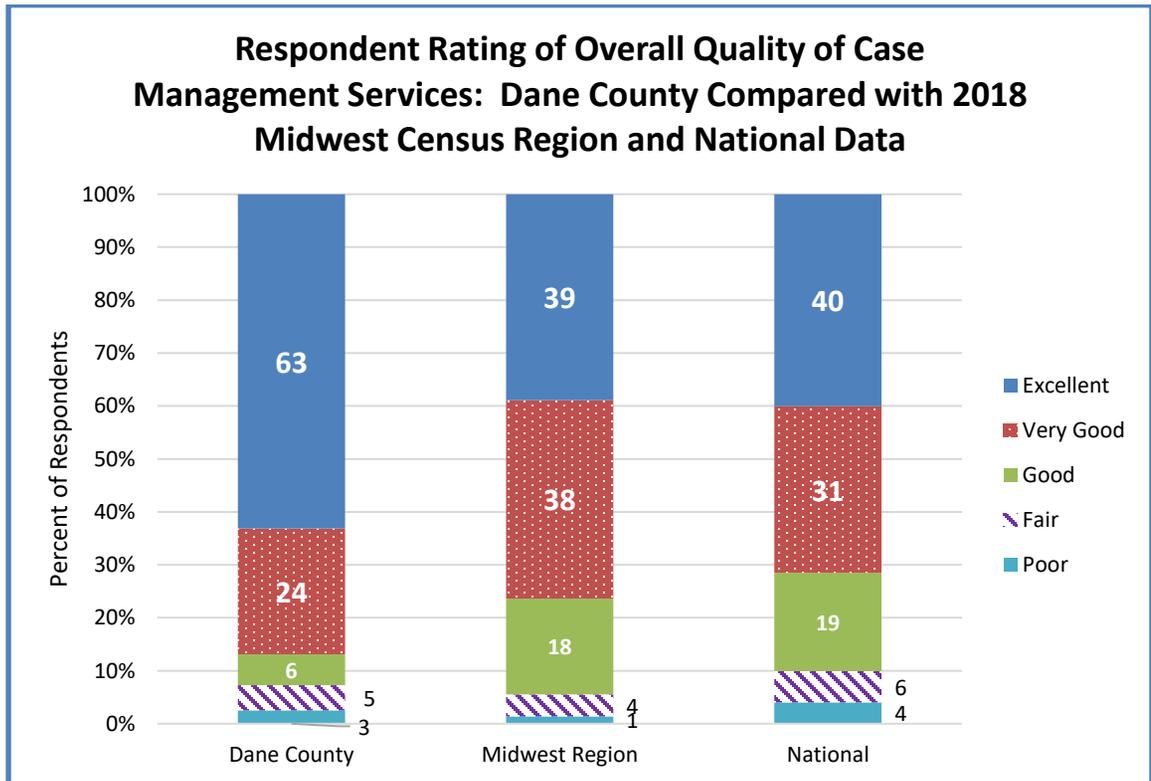
³⁵ $\chi^2=91.362$, $df=1$, $p<.05$.

³⁶ $\chi^2=33.287$, $df=1$, $p<.05$.

Graph 11 provides a comparison of the Dane County survey conducted in 2019 with results of the 2018 National Survey of Older Americans Act Participants for the Midwest Census Region and with the national (non-stratified) results. The data is reported by the Administration on Aging via the AGing Integrated Database (AGID); 2018 is the most recent year for which data were compiled at both regional and National levels.

Dane County survey respondents were more likely to rate their case management services as “Excellent,”³⁷ compared with respondents to the 2018 National Survey and results for the Midwest Census Region.

Graph 11: Comparison of Dane County Respondents Rating of Overall Quality of Case Management Services With Respondents from 2018 National Survey of Older Americans Act Participants Survey for the Midwest Census Region and Nationally



Midwest Census Region = Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin

N = 274 for DCDHS, 72 for Midwest Census Region, and 372 for National.

³⁷ $\chi^2=46.326, df=8, p<.05$.

Benefits

The survey also examined the benefits of receiving case management services.

Survey respondents indicated their case manager helped them get services they did not have before (79%) and their situation was better because of their case managers' help (90%).

Of the respondents to the survey, 88% indicated case management services helped them to continue to live where they chose.

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

There were no significant differences based on gender, generation, or length of service regarding the benefits of case management services.

Significant differences were seen based on race/ethnic status and by Senior Focal Point agency.

Table 10: Benefits of Receiving Case Management Services by Survey Item

Survey Question	Percent of Respondents			Respondents (N)
	Yes	No	Don't Know	
Does your case manager help you get services that you did not have before?	78.7	9.9	11.4	263
As a result of receiving the case management services, do you have a better idea of where to get information about other services?	79.9	20.1		273
Is your situation better because of your case manager's help?	90.2	9.8		266
Do the case management services help you continue to live where you choose?	87.9	12.1		265

Sample of Comments from Survey Respondents

We already had MTM and energy asst. So [Case Manager] couldn't help us with those. We can afford our bills, but no groceries. So, [Case Manager] got us food!

The services received have been very helpful in aiding in remaining independent.

[Case Manager] is awesome...always able to know or find any info or service that you need or that will make life better.

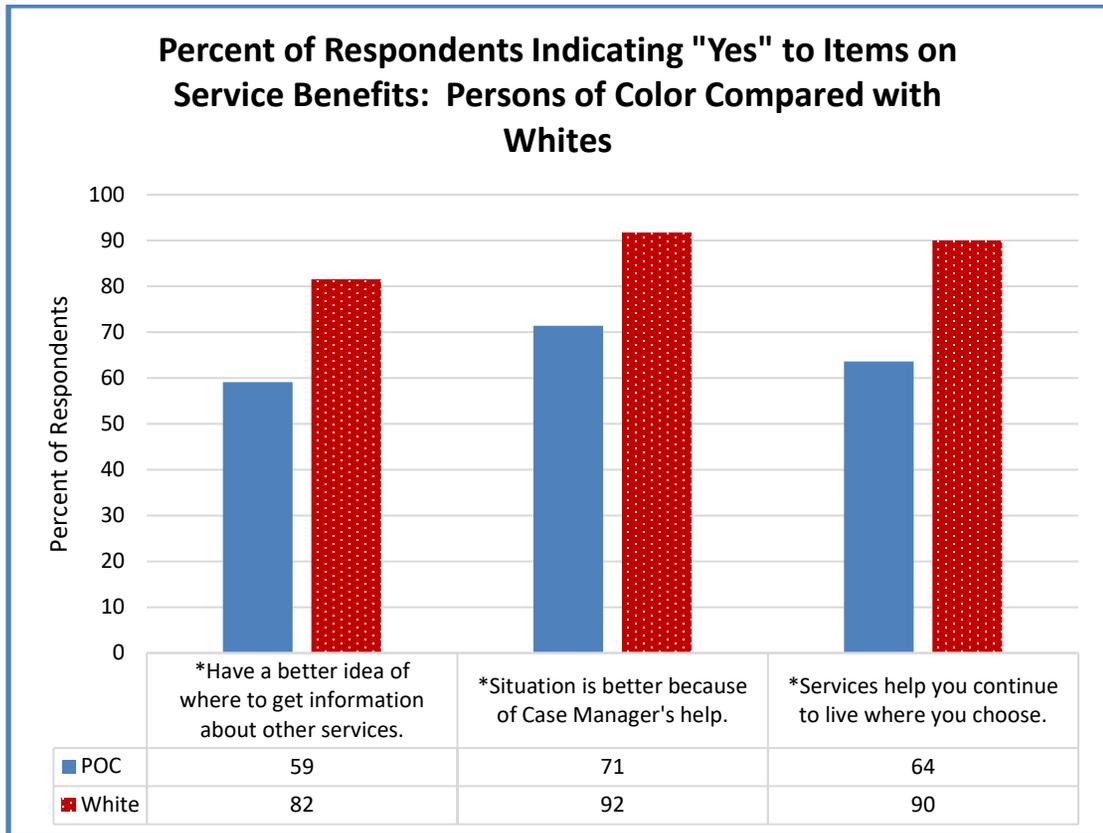
I am [over 90] years old and [Case Manager] is keeping me in my home. Our case manager is doing a very good job.

Among Persons of Color, 78% indicated affirmatively that their case manager helped them get services they did not have before. This compares with 90% of Whites. While the difference is notable, it is not statistically significant.

For the other three items that focused on the benefits of receiving case management services, Persons of Color were significantly less likely than White respondents to indicate "Yes":

- They have a better idea of where to get information about other services (59% for Persons of Color compared with 82% of Whites).³⁸
- Their situation is better because of their case manager's help (71% of Persons of Color compared with 92% of Whites).³⁹
- The services help them continue to live where they choose (64% of Persons of Color compared with 90% of Whites).⁴⁰

Graph 12: Comparison of Responses to Items Related to Benefits of Case Management Services for Persons of Color and Whites



N for Persons of Color = 21 – situation better; 22 for better idea of where to get information and live where choose. N for Whites = 249 - better idea of where to get information; 243 – situation better; 241 – live where choose.

Asterisk (*) indicates a significant difference.

³⁸ $\chi^2=6.290, df=1, p<.05.$

³⁹ $\chi^2=9.008, df=1, p<.05.$

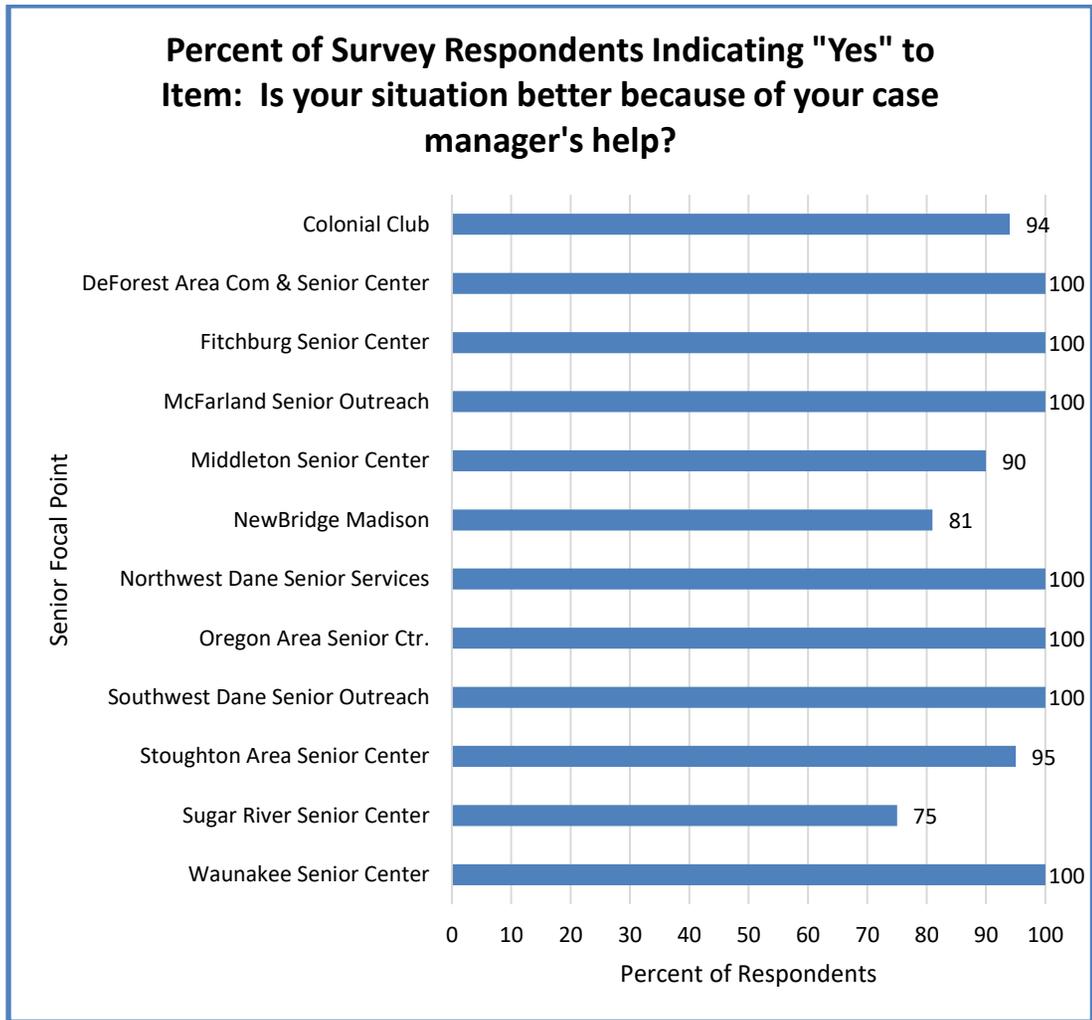
⁴⁰ $\chi^2=13.153, df=1, p<.05.$

A significant difference was found based on the Senior Focal Point on the item:

- Is your situation better because of your case manager's help?⁴¹

Overall, 90% of respondents felt their situation was better because of their case manager's help. As seen in Graph 13, this was true for 75% of respondents to the survey from the Sugar River Senior Center and for 81% of respondents receiving services through NewBridge Madison.

Graph 13: Percent of Survey Respondents Indicating "Yes" to Item, Is your situation better because of your case manager's help?



N = 266.

⁴¹ $\chi^2=26.162, df=11, p<.05.$

Graph 14 provides a comparison of the Dane County survey conducted in 2019 with results of the 2018 National Survey of Older Americans Act Participants for the Midwest Census Region and with the national (non-stratified) results.

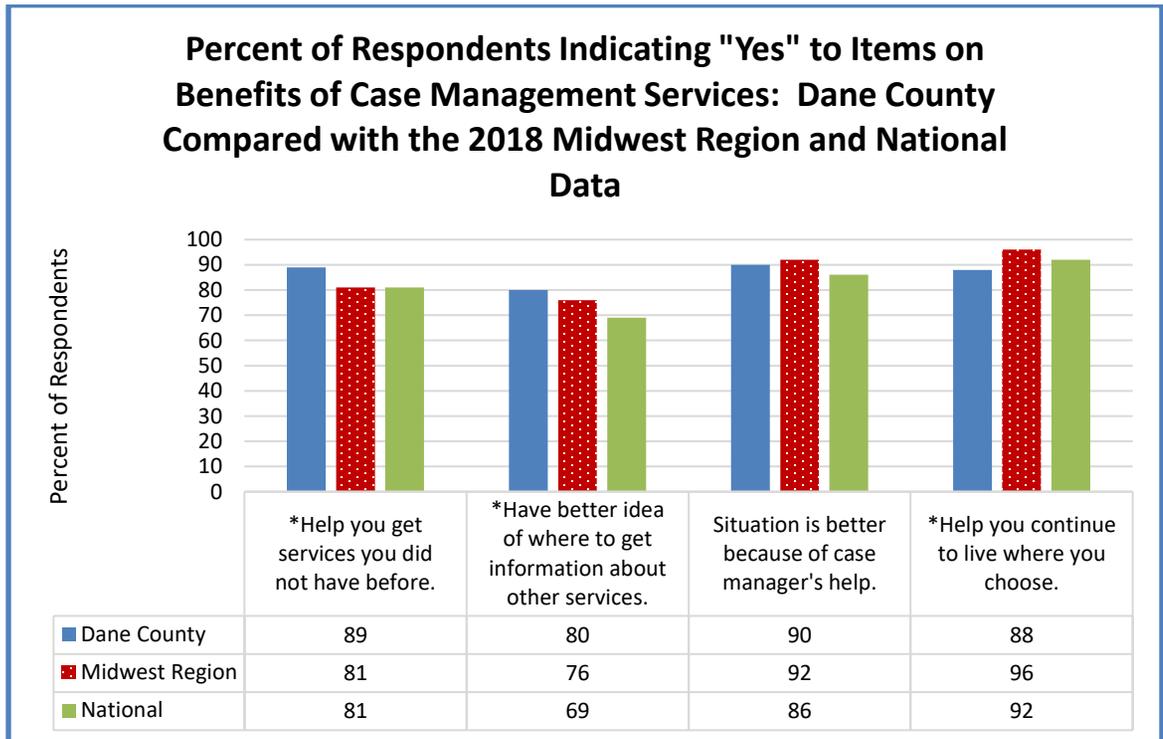
Respondents to the 2018 National Survey were less likely than those from the Midwest Census Region and the 2019 Dane County survey to indicate that their case manager helped them get services they did not have before⁴² and as a result of receiving case management services, they have a better idea of where to get information about other services.⁴³

Dane County survey respondents (88%) were significantly less likely than 2018 survey respondents from the Midwest Region (96%) and nationally (92%) to indicate that case management services helped them to continue to live at home or where they chose.⁴⁴ The question on the national survey, “Do the services help you continue to live in your own home?” differed from the question on the Dane County survey, “Do the case management services help you continue to live where you choose?” The change was made on the Dane County survey due to the number of respondents in earlier surveys indicating they no longer lived at home - but in an apartment.

⁴² $\chi^2=7.189, df=2, p<.05.$

⁴³ $\chi^2=10.569, df=2, p<.05.$

Graph 14: Comparison of Dane County Respondents Rating of Benefits of Case Management Services with Respondents from 2018 National Survey of Older Americans Act Participants Survey for the Midwest Census Region and Nationally



Midwest Census Region = Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

Asterisk(*) indicates a significant difference.

⁴⁴ $\chi^2=6.089, df=2, p<.05.$

Recommendations for Improvement

The survey had a free-form question that asked, “What recommendations do you have for improving case management services?” Of the 115 respondents to this question, 20% (23) indicated they had no recommendations for improvement and another 41% (47) had praise for the service and/or case manager as seen in the following:

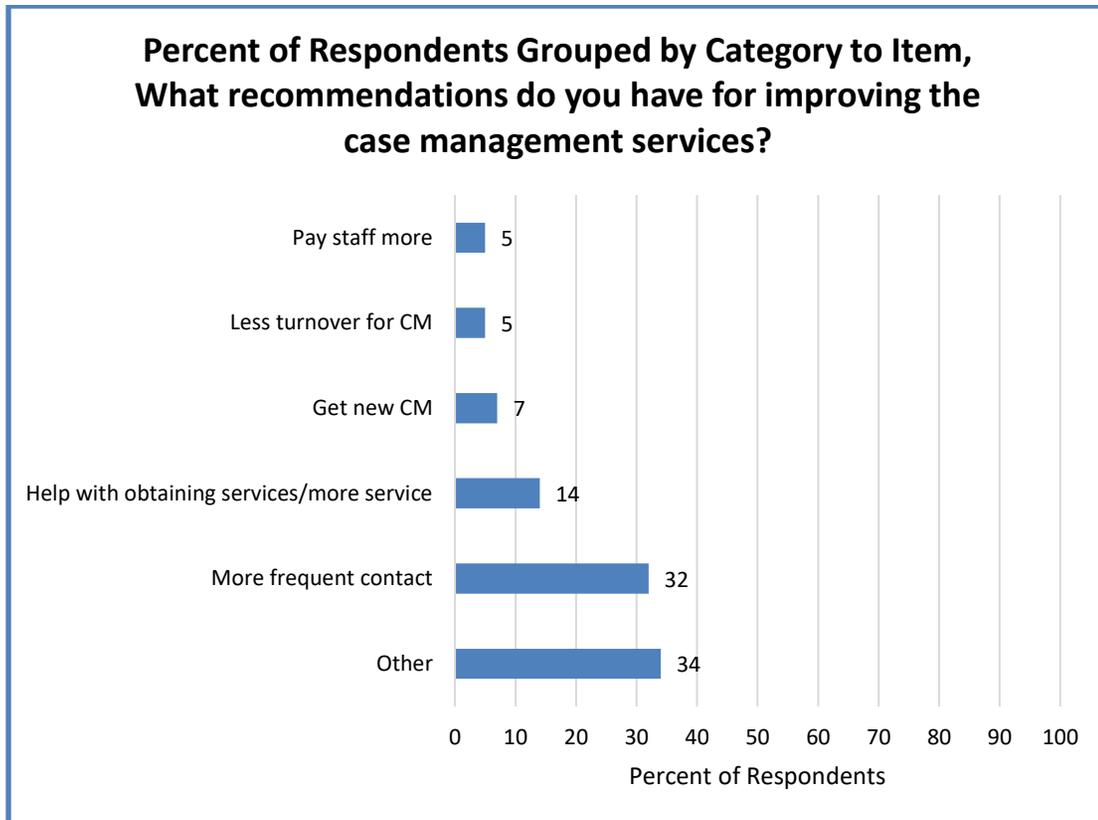
- *[CM] is amazing.*
- *[Case Manager] is perfect.*
- *I do not see how it could be better.*

Responses for the remaining comments were grouped in one of 6 categories as seen in Graph 15.

Nearly two-thirds of respondents with a written comment (32%) wanted more follow-up as seen in these comments:

- *More frequent contact and interaction with the case manager. Haven't seen them in months. When I tried contacting by phone - call not returned.*
- *Call me more often.*
- *I'm finding the merger not helpful! My first case manager, ..., was far more helpful and responded to my calls or e-mails in a timely fashion.*

Graph 15: Grouped Responses to Survey Question “What recommendations do you have for improving the case management services?”



N = 44. There were 46 comments from 44 surveys. Two of these included praise for the case manager in addition to another comment that is classified above.

Comments among the 14% of respondents who wanted help with obtaining services or having more services included:

- *Better help with SS [Social Security] Disability benefit and health care.*
- *Housing please.*
- *I need to know more about going to meal place and also to try to get there on my own.*
- *Keep up the good work; but computer/ Apple products tech support would help.*

About 5% of respondents indicated they wanted less turnover or more consistency with case managers. 7% went so far as to request a new case manager. A sample of the comments includes:

- *My case manager was changed without any notice or reason given - no continuity.*
- *I would like a different case manager.*
- *I need another case manager. I need someone like [Case Manager name].*

The category of Other had a variety of recommendations and other comments, such as:

- *The help I really need is help with my city taxes. Too much - way too much.*
- *Would like some of Medicare better explained.*
- *Help me read letters so I can know what to do.*
- *Make sure you're not talked down to.*
- *That they would pay more attention.*
- *[Case Manager] should send correct information to some services.*
- *With all new senior apt. buildings, builders don't think about problems senior have. Height-bars in showers, etc. Could write a lot.*
- *Would like less spices in food.*

Results by Contracted Agency

The following section of the report presents the findings for each contracted agency – this includes 424 useable returned surveys. Note, two (2) additional surveys were included that arrived just prior to the completion of this report. Just those that had no case management services or only had assistance with obtaining medical equipment or Medicare/Medicaid/Medicare Part D were excluded. All data are based on percentages of survey respondents for each question. Caution should be used when comparing agencies due to the small number of responses for some.

Agency	Number of Survey Respondents to Question	Avg. Number of Services Coordinated Per Survey Respondent	Q1. Which services does your case manager help to coordinate for you? (Check all that apply). Percentage of respondents for whom service is coordinated.				
			Adult Day Services	Caregiver Resources/ Grants	Energy Assistance	Food Assistance/ Food Stamps	Home Chore Services
Colonial Club Senior Activity Center	29	4.5	7	28	34	38	24
DeForest Area Community & Senior Center	18	3.7	17	11	28	33	17
Fitchburg Senior Center	24	3.5	17	21	8	13	25
McFarland Senior Outreach Services	27	4.3	15	26	33	41	22
Middleton Senior Center	20	4.3	15	15	25	55	15
NewBridge Madison	131	3.4	12	13	22	40	45
Northwest Dane Senior Services	29	3.3	17	10	7	10	14
Oregon Area Senior Center	29	3.2	10	7	7	10	10
Southwest Dane Senior Outreach	16	3.6	0	0	31	31	0
Stoughton Area Senior Center	30	3.8	10	37	27	17	13
Sugar River Senior Center	14	3.6	14	29	21	21	7
Wausaukee Senior Center	57	3.3	12	25	21	16	14

Agency	Number of Survey Respondents to Question	(Q1. Continued) Which services does your case manager help to coordinate for you? (Check all that apply). Percentage of respondents for whom service is coordinated.					
		Home-Delivered Meals	Homemaker/ Housekeeper	Housing Assistance	Legal Assistance	Lifeline/PERS	Medicare/ Medicaid/ Medicare Part D (Drug)
Colonial Club Senior Activity Center	29	52	17	14	17	17	52
DeForest Area Community & Senior Center	18	11	0	11	39	6	61
Fitchburg Senior Center	24	33	17	8	17	8	33
McFarland Senior Outreach Services	27	52	22	15	11	7	33
Middleton Senior Center	20	35	5	5	15	15	60
NewBridge Madison	131	23	19	18	10	5	30
Northwest Dane Senior Services	29	62	0	10	3	0	28
Oregon Area Senior Center	29	38	3	10	10	3	38
Southwest Dane Senior Outreach	16	44	6	13	13	0	44
Stoughton Area Senior Center	30	50	10	17	10	10	40
Sugar River Senior Center	14	50	14	14	21	7	21
Waunakee Senior Center	57	63	2	7	9	7	35

Agency	Number of Survey Respondents to Question	(Q1. Continued) Which services does your case manager help to coordinate for you? (Check all that apply). Percentage of respondents for whom service is coordinated.					
		Medical Equipment	Medication Management	Personal Care Services	Senior Center Lunch and Programs	Transportation	Other
Colonial Club Senior Activity Center	29	17	10	24	28	48	17
DeForest Area Community & Senior Center	18	44	0	22	33	11	22
Fitchburg Senior Center	24	38	4	21	42	29	17
McFarland Senior Outreach Services	27	41	7	15	30	41	19
Middleton Senior Center	20	60	5	20	30	25	25
NewBridge Madison	131	24	8	15	15	24	13
Northwest Dane Senior Services	29	31	10	7	48	48	24
Oregon Area Senior Center	29	66	3	7	45	41	7
Southwest Dane Senior Outreach	16	56	19	19	31	44	13
Stoughton Area Senior Center	30	30	17	23	33	30	10
Sugar River Senior Center	14	29	7	29	36	36	7
Waunakee Senior Center	57	28	12	16	32	26	2

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	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
Overall	95	5	367		91	3	6	403
Colonial Club Senior Activity Center ⁴⁵	88	13	24		93	4	4	27
DeForest Area Community & Senior Center	100	0	15		100	0	0	17
Fitchburg Senior Center	100	0	21		100	0	0	23
McFarland Senior Outreach Services	100	0	25		92	0	8	26
Middleton Senior Center	100	0	15		100	0	0	19
NewBridge Madison	89	11	113		80	9	11	124
Northwest Dane Senior Services	100	0	29		100	0	0	28
Oregon Area Senior Center	100	0	26		100	0	0	28
Southwest Dane Senior Outreach	100	0	14		100	0	0	15
Stoughton Area Senior Center	100	0	24		93	0	7	27
Sugar River Senior Center	77	23	13		79	7	14	14
Wausaukee Senior Center	100	0	48		95	0	5	55

⁴⁵ Row total does not equal 100% due to rounding.

Agency	Q4. Does your case manager explain your services in a way you can understand?					Q5. Do you and your case manager work together to decide what services you need?			
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
Overall	95	3	2	400		90	7	3	377
Colonial Club Senior Activity Center	93	7	0	28		92	4	4	26
DeForest Area Community & Senior Center	100	0	0	17		94	0	6	16
Fitchburg Senior Center	100	0	0	23		90	0	10	21
McFarland Senior Outreach Services	92	0	8	26		92	4	4	25
Middleton Senior Center	100	0	0	19		94	0	6	18
NewBridge Madison	89	7	4	123		86 ⁴⁶	13	2	119
Northwest Dane Senior Services	100	0	0	27		96	4	0	27
Oregon Area Senior Center	100	0	0	28		92	4	4	25
Southwest Dane Senior Outreach	100	0	0	15		100	0	0	13
Stoughton Area Senior Center	100	0	0	27		93	7	0	27
Sugar River Senior Center ⁴⁷	85	8	8	13		77	15	8	13
Wausaukee Senior Center	98	0	2	54		91 ⁴⁸	4	4	47

⁴⁶ Row total does not equal 100% due to rounding.

⁴⁷ Row total does not equal 100% due to rounding.

⁴⁸ Row total does not equal 100% due to rounding.

Agency	Q6. Does your case manager treat you with respect?					Q7. Does your case manager involve you in discussing and planning your services?			
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
Overall⁴⁹	96	1	2	406		88	7	5	376
Colonial Club Senior Activity Center ⁵⁰	93	4	4	28		89	7	4	27
DeForest Area Community & Senior Center	100	0	0	17		94	0	6	16
Fitchburg Senior Center	100	0	0	24		84	0	16	19
McFarland Senior Outreach Services	100	0	0	26		88	0	12	26
Middleton Senior Center	100	0	0	19		94	0	6	18
NewBridge Madison	93	3	4	127		82	15	3	120
Northwest Dane Senior Services	100	0	0	29		96	0	4	27
Oregon Area Senior Center	100	0	0	27		96	0	4	26
Southwest Dane Senior Outreach	100	0	0	15		100	0	0	14
Stoughton Area Senior Center	93	0	7	27		92	8	0	26
Sugar River Senior Center	93	0	7	14		75	8	17	12
Wausaukee Senior Center	98	0	2	53		89	4	7	45

⁴⁹ Row total does not equal 100% due to rounding.

⁵⁰ Row total does not equal 100% due to rounding.

Agency	Q8. Does your case manager do a good job setting up services (transportation, meals, medical appointments, etc.) for you?					Q9. Does your case manager help you get services that you did not have before?			
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
Overall⁵¹	83	7	9	348		81	9	10	369
Colonial Club Senior Activity Center	87	4	9	23		88	12	0	26
DeForest Area Community & Senior Center	93	0	7	14		94	0	6	16
Fitchburg Senior Center ⁵²	86	5	10	21		91	0	9	22
McFarland Senior Outreach Services	83	4	13	23		76	4	20	25
Middleton Senior Center	75	19	6	16		84	11	5	19
NewBridge Madison ⁵³	72	12	17	103		71	19	11	113
Northwest Dane Senior Services	93	0	7	27		96	4	0	27
Oregon Area Senior Center	88	8	4	25		86 ⁵⁴	5	10	21
Southwest Dane Senior Outreach	92	0	8	13		93	0	7	14
Stoughton Area Senior Center	88	8	4	26		85 ⁵⁵	7	7	27
Sugar River Senior Center	75	17	8	12		50	17	33	12
Wausaukee Senior Center	96	2	2	45		83	2	15	47

⁵¹ Row total does not equal 100% due to rounding.

⁵² Row total does not equal 100% due to rounding.

⁵³ Row total does not equal 100% due to rounding.

⁵⁴ Row total does not equal 100% due to rounding.

⁵⁵ Row total does not equal 100% due to rounding.

Agency	Q10. Did your case manager develop a care plan for the services you need? (A care plan is a document that contains information about who you saw, your needs, the kinds of services you receive, and how you are doing once you receive the services.)					Q11. Did you receive a copy of the care plan? (Based on those who said a care plan was developed.)			
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Don't Know/Blank	Number of Survey Respondents
Overall	46	25	29	350		75	9	16	162
Colonial Club Senior Activity Center	40	20	40	25		90	10	0	10
DeForest Area Community & Senior Center	50	19	31	16		100	0	0	8
Fitchburg Senior Center	28	33	39	18		80	0	20	5
McFarland Senior Outreach Services ⁵⁶	43	30	26	23		60	20	20	10
Middleton Senior Center ⁵⁷	44	33	22	18		75	13	13	8
NewBridge Madison	50	25	25	116		72	9	19	58
Northwest Dane Senior Services	67	14	19	21		93	7	0	14
Oregon Area Senior Center	50	20	30	20		70	20	10	10
Southwest Dane Senior Outreach	33	25	42	12		75	25	0	4
Stoughton Area Senior Center	50	8	42	26		62	23	15	13
Sugar River Senior Center	23	46	31	13		67	0	33	3
Waunakee Senior Center	45	31	24	42		68	0	32	19

⁵⁶ Row total does not equal 100% due to rounding.

⁵⁷ Row total does not equal 100% due to rounding.

Agency	Q12. Are you able to select the services you receive?				Q13. As a result of receiving the case management services, do you have a better idea of where to get information about other services?		
	Yes	No	Number of Survey Respondents		Yes	No	Number of Survey Respondents
Overall	94	6	381		83	17	388
Colonial Club Senior Activity Center	92	8	25		83	17	24
DeForest Area Community & Senior Center	100	0	16		100	0	18
Fitchburg Senior Center	95	5	22		90	10	20
McFarland Senior Outreach Services	95	5	22		85	15	26
Middleton Senior Center	95	5	20		94	6	17
NewBridge Madison	89	11	115		74	26	121
Northwest Dane Senior Services	100	0	28		92	8	26
Oregon Area Senior Center	100	0	28		93	7	29
Southwest Dane Senior Outreach	100	0	15		93	7	14
Stoughton Area Senior Center	100	0	29		86	14	28
Sugar River Senior Center	92	8	12		58	42	12
Waunakee Senior Center	96	4	49		79	21	53

Agency	Q14. Is your situation better because of your case manager's help?				Q16. Are you satisfied with the case management services you receive?		
	Yes	No	Number of Survey Respondents		Yes	No	Number of Survey Respondents
Overall	92	8	380		94	6	394
Colonial Club Senior Activity Center	92	8	24		96	4	23
DeForest Area Community & Senior Center	100	0	17		100	0	18
Fitchburg Senior Center	100	0	19		100	0	23
McFarland Senior Outreach Services	100	0	25		100	0	25
Middleton Senior Center	94	6	17		100	0	19
NewBridge Madison	80	20	114		84	16	118
Northwest Dane Senior Services	100	0	28		100	0	28
Oregon Area Senior Center	100	0	29		100	0	29
Southwest Dane Senior Outreach	100	0	16		100	0	16
Stoughton Area Senior Center	96	4	26		90	10	29
Sugar River Senior Center	75	25	12		100	0	11
Waunakee Senior Center	100	0	53		100	0	55

Agency	Q17. Do the case management services help you continue to live where you choose?				Q20. Did you complete this survey on your own or did someone help you?		
	Yes	No	Number of Survey Respondents		On own	Someone helped	Number of Survey Respondents
Overall	90	10	383		83	17	399
Colonial Club Senior Activity Center	96	4	24		78	22	27
DeForest Area Community & Senior Center	93	7	14		88	12	17
Fitchburg Senior Center	95	5	21		75	25	24
McFarland Senior Outreach Services	100	0	25		84	16	25
Middleton Senior Center	89	11	18		84	16	19
NewBridge Madison	83	17	122		87	13	123
Northwest Dane Senior Services	93	7	27		73	27	26
Oregon Area Senior Center	93	7	29		86	14	29
Southwest Dane Senior Outreach	92	8	13		87	13	15
Stoughton Area Senior Center	90	10	29		85	15	27
Sugar River Senior Center	78	22	9		85	15	13
Waunakee Senior Center	96	4	52		78	22	54

Agency	Q.18 How would you rate the overall quality of the case management services you have received? Would you say.... (Percent)					
	Excellent	Very Good	Good	Fair	Poor	Number of Survey Respondents
Overall	65	23	6	4	2	399
Colonial Club Senior Activity Center	71	17	8	4	0	24
DeForest Area Community & Senior Center	94	6	0	0	0	16
Fitchburg Senior Center	61	30	9	0	0	23
McFarland Senior Outreach Services	62	23	15	0	0	26
Middleton Senior Center	72	17	11	0	0	18
NewBridge Madison ⁵⁸	52	26	7	11	5	121
Northwest Dane Senior Services	75	25	0	0	0	28
Oregon Area Senior Center	69	28	3	0	0	29
Southwest Dane Senior Outreach	79	21	0	0	0	14
Stoughton Area Senior Center	79	14	0	0	7	29
Sugar River Senior Center	62	23	0	15	0	13
Waunakee Senior Center	68	23	9	0	0	56

⁵⁸ Row total does not equal 100% due to rounding.

Agency	Q12. What recommendations do you have for improving the case management services? (Free-form narrative classified into categories of responses.)						
	Number of Clients			Percent of Respondents (N = Total number of clients with recommendations minus None)			
	Total Number of Clients with Recommendations	None	Praise	More Frequent Contact	More Staff	Help Obtaining Additional Services	Get New Case Manager
Colonial Club Senior Activity Center	14	5	3	11	11	11	
DeForest Area Community & Senior Center	5	2	2				
Fitchburg Senior Center	7	1	5				
McFarland Senior Outreach Services	10	2	6	13			
Middleton Senior Center	9	1	5	13			
NewBridge Madison	49	5	15	23		7	5
Northwest Dane Senior Services	7	1	2			33	
Oregon Area Senior Center	9	1	7		13		
Southwest Dane Senior Outreach	7		5		14	14	
Stoughton Area Senior Center	14	1	10	7			8
Sugar River Senior Center	5	2	1				
Waunakee Senior Center	16	3	11	8			

Agency	Q12. What recommendations do you have for improving the case management services? (Free-form narrative classified into categories of responses.)		
	Percent of Respondents		
	Less Turnover in Case Managers	Pay Case Managers More	Other
Colonial Club Senior Activity Center			22
DeForest Area Community & Senior Center			33
Fitchburg Senior Center			33
McFarland Senior Outreach Services			13
Middleton Senior Center			25
NewBridge Madison	5		25
Northwest Dane Senior Services			
Oregon Area Senior Center		13	
Southwest Dane Senior Outreach		14	
Stoughton Area Senior Center			
Sugar River Senior Center			67
Wausaukee Senior Center			15

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 this year from «**Provider Name for Survey**» that were provided by «**Name of Case Manager First Name Last N**». 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 **Tuesday, November 12, 2019.**

**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.	Caregiver Resources/Grants	<input type="checkbox"/>	1
c.	Energy Assistance	<input type="checkbox"/>	1
d.	Food Assistance/Food Stamps/SNAP	<input type="checkbox"/>	1
e.	Home Chore Services	<input type="checkbox"/>	1
f.	Home-Delivered Meals	<input type="checkbox"/>	1
g.	Homemaker / Housekeeper	<input type="checkbox"/>	1
h.	Housing Assistance	<input type="checkbox"/>	1
i.	Legal Assistance	<input type="checkbox"/>	1
j.	Lifeline/PERS	<input type="checkbox"/>	1
k.	Medicare / Medicaid / Medicare Part D (Drug)	<input type="checkbox"/>	1
l.	Medical Equipment (wheelchair, walker, etc.)	<input type="checkbox"/>	1
m.	Medication Management	<input type="checkbox"/>	1
n.	Personal Care Services.	<input type="checkbox"/>	1
o.	Senior Center Lunch and Programs	<input type="checkbox"/>	1
p.	Transportation	<input type="checkbox"/>	1
q.	Other	<input type="checkbox"/>	1

List: _____

2. Do you know how to contact your case manager when you need to?
 Yes..... 1
 No..... 2

		Yes	No	Don't Know
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.	Do you and your case manager work together to decide what services you need?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
6.	Does your case manager treat you with respect?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
7.	Does your case manager involve you in discussing and planning your services?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
8.	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
9.	Does your case manager help you get services that you did not have before?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3

10. Did your case manager develop a care plan for the services you need? (A care plan is a document that contains information about who saw you, your needs, the kinds of services you receive, and how you are doing once you receive the services.)
 Yes..... 1
 No..... 2
 Don't know..... 3

11. Did you receive a copy of the care plan?
 Yes..... 1
 No..... 2
 Don't know..... 3

12. Are you able to select the services you receive?
Yes..... 1
No..... 2

13. 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

14. Is your situation better because of your case manager's help?
Yes..... 1
No..... 2

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

16. Are you satisfied with the case management services you receive?
Yes..... 1
No..... 2

17. Do the case management services help you continue to live where you choose?
Yes..... 1
No..... 2

18. 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

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

20. Did you complete this survey on your own or did someone help you?

- I completed this on my own..... 1
Someone helped me complete the survey..... 2



21. What is the relationship of the person who helped you?

- Family Member..... 1
Friend..... 2
Case Manager..... 3
Other..... 4

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.: «Survey_Number»