



# Survey of Persons Receiving COP-W/CIP II Case Management Services in Dane County

January 1, 2016 – August 31, 2016



May 2017

# Introduction

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## I. Background

Dane County Department of Human Services (DCDHS) provides case management services for persons with long-term support needs under two Medicaid Waiver programs: Community Options Program – Waiver (COP-W) and Community Integration Program II (CIP II). The Medicaid (M.A.) Waiver programs were created by the federal government and use Medicaid funds to serve people in their home communities rather than institutions.

The COP-W Program was developed to provide community services to the frail elderly and persons with physical disabilities at risk of entering a nursing home.

CIP II was developed to provide community services to the frail elderly and persons with physical disabilities after a nursing home bed is closed.

In order to receive the M.A. waiver services, clients must be Dane County residents; have an eligible nursing home level of care; live in a waiver-allowable setting – such as their own home, a home of a family member, an adult family home, etc.; meet both the financial and non-financial criteria for Medicaid eligibility; have a need for waiver program services; and fit the waiver target group.

The primary goal of case management services is to provide persons 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; development of an individualized service plan, also known as an ISP; the coordination of a variety of services, such as home chore and personal care; monitoring the efficacy of the plan; resolving problems that arise; and providing support for the participant.

Case management services in Dane County are provided by DCDHS staff in the Long-Term Support Unit at the South Madison Office and through contracts with two purchase of service agencies.

## II. Study Purpose

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

## 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](http://www.aoa.acl.gov/Program_Results/POMP/CaseManagement.aspx), as updated in 2008 and available from the Administration for Community Living, AGing Integrated Database (AGID) served as the base instrument. That instrument has been used in looking at performance nationally and has been used for assessing case management services for seniors within the Dane County Department of Human Services.

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

The 2016 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 updated for Dane County.
- Not including the question, "Do you and your case manager work together to decide what services you need?"
- 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 in 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.

The final survey included 19 items; it may be found in Appendix A.

#### Access

The survey was made available in both paper and electronic form. The electronic version was produced on SurveyMonkey with the assistance of DCDHS Information Services. A special thank you goes to Kari Clemens, Systems Coordinator, for her work on this. Of the clients in the random sample, 22 were sent links to the form in SurveyMonkey.

#### Translation

The survey was made available in English.

### 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, 2016, and August 30, 2016, and who were reported into the DCHS Information System. This was generated on September 12, 2016, 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 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 providing services. These were sent 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.

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

Recognizing that some clients would be more proficient at completing an on-line version of the survey, Community Living Alliance was asked to indicate which of their clients should receive an electronic version of the survey and to provide their e-mail addresses.

It was originally assumed that as DCDHS staff use the DCDHS Information System, that the client addresses and guardian information within the system would be current. This was later found not to be the case and client lists were sent to staff October 18, 2016 for updating. This meant that some clients who were originally in the random sample were later dropped typically due to being deceased.

The data from the returned spreadsheets were updated into a “master” spreadsheet that was “cleaned.”

Of the original 705 rows of clients, 71 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	70	99
Duplicate	1	1
Total	71	100

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 464 then being included in the survey mailing. This number was subsequently reduced to 418 with the receipt of spreadsheets from DCDHS staff.

### Survey Method

A total of 418 survey forms were mailed October 10 – 25, 2016.<sup>1</sup> 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 30 forms returned with bad addresses, 11 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.

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<sup>1</sup> 22 were sent electronically.

**Table 2:** Surveys by Disposition by Agency

Agency	Surveys Mailed	Returned with Bad Addresses and Not Re-mailed	Surveys to Clients
Community Living Alliance	174	7	167
Dane County Dept. of Human Services	142	7	135
South Madison Coalition of the Elderly	102	3	99
Total	418	17 <sup>2</sup>	401

Out of the original 418 survey forms that were mailed, 401 were presumed to have made it to the intended recipient.

Table 3 shows the response rate by agency.

**Table 3:** Response Rate by Agency

Agency	Surveys to Clients	Surveys Returned	Useable Surveys	Response Rate (Percent)
Community Living Alliance	167	60	60	35.9
DCDHS	135	63	63	46.7
South Madison Coalition of the Elderly	99	44	44	44.4
Total	401	167	167	41.6

Response Rate

The overall response rate was 41.6%; 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.

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<sup>2</sup> Two additional survey forms were returned. The address on these were correct, but the intended recipient was "temporarily away." These were not re-mailed.

#### Confidence Interval/Confidence Level

A confidence interval, also known as the margin of error, of 5 was originally selected. A confidence level of 95% was selected. which meant that 239 completed surveys would need to be returned. With 167 returned surveys, the confidence interval was 6.51.

The confidence level is expressed as a percentage and represents how often the true percentage of the population who would pick an answer that lies within the confidence interval. The 95% confidence level means one can be 95% certain.

#### Data Entry

Data entry was done by Administrative Assistant, Dawn MacFarlane to whom gratitude is extended.

### **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
- Services Coordinated
- Participation in Service Planning
- Service Quality
- Overall Quality
- Benefits
- Recommendations for Improvement
- Results for Selected Agencies

Briefly, some of the findings include:

- Survey respondents indicated their case managers treated them with respect (97%), returned their telephone calls in a timely manner (92%), explained services in a way they could understand (96%), and involved them in discussing and planning their services (94%).
- Persons of Color (94%) were significantly less likely than Whites (100%) to indicate their case manager treated them with respect.
- While 85% of the respondents indicated their case manager developed a care plan for the services they needed, just 74% recalled receiving a copy of the care plan.
- Survey respondents indicated that their case managers helped them get services they did not have before (81%), that their situations were better because of their case managers' help (97%), and that the case management services helped them continue to live where they chose (97%).
- Persons of Color (88%) compared with Whites (99%) were significantly less likely to indicate their situation was better because of their case manager's help.
- Nearly 99% 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 March 31, 2017 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:

- Sending out lists of clients for updating to DCDHS case managers at the outset.

## **VII. Next Steps**

This information will be shared with:

- DCDHS staff and managers;
- Agencies that were part of the survey; and
- General public via posting on the DCDHS web site.

Additionally,

- Comments attributable to individual agencies 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.

# Demographics

During the period of January 1, 2016, through August 31, 2016, 692 unduplicated COP-W/CIP II clients received case management services through the Dane County Department of Human Services.

Survey respondents were representative of clients served during the study period in terms of gender, race/ethnicity, and generation.

As shown in Table 4, respondents were more likely to be White (89%) than clients served during the study period (84%), although this was not statistically significant.<sup>3</sup>

The average age of survey respondents was 73.1 compared with 70.5 of clients served during the study period.

**Table 4:** Demographics of Survey Respondents 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
<b>Gender</b>						
Female	469	67.8	274	65.6	112	67.1
Male	223	32.2	144	34.4	55	32.9
Total	692	100.0	418	100.0	167	100.0
<b>Race/Ethnicity</b>						
Asian	26	3.8	19	4.5	3	1.8
Af. Amer/Black	70	10.1	39	9.3	10	6.0
Hispanic/Latinx	10	1.4	8	1.9	5	3.0
Native American	1	0.1	1	0.2	0	0.0
Pacific Islander	3	0.4	1	0.2	0	0.0
White	580	83.8	349	83.5	149	89.2
More than 1 Race	1	0.1	0	0.2	0	0.0
Unknown	1	0.1	1	0.2	0	0.0
Total	692	99.8 <sup>4</sup>	418	100.0	167	100.0
<b>Age at Survey</b>						
20-24	4	0.6	4	1.0	1	0.6
25-29	6	0.9	4	1.0	0	0.0
30-34	11	1.6	7	1.7	1	0.6
35-39	12	1.7	9	2.2	0	0.0
40-44	14	2.0	11	2.6	4	2.4
45-49	25	3.6	18	4.3	8	4.8
50-54	38	5.5	27	6.5	9	5.4

<sup>3</sup>  $\chi^2 = 6.7591$ ,  $df=5$ ,  $p<.05$

<sup>4</sup> Will not equal 100% due to rounding.

**Table 4:** 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
55-59	59	8.5	41	9.8	17	10.2
60-64	56	8.1	34	8.1	13	7.8
65-69	58	8.4	32	7.7	13	7.8
70-74	60	8.7	39	9.3	16	9.6
75-79	67	9.7	42	10.0	24	14.4
80-84	67	9.7	33	7.9	13	7.8
85-89	92	13.3	49	11.7	12	7.2
90-94	71	10.3	38	9.1	21	12.6
95-99	44	6.4	25	6.0	13	7.8
100+	8	1.2	5	1.2	2	1.2
Total	692	100.2 <sup>5</sup>	418	100.1 <sup>6</sup>	167	100.2 <sup>7</sup>
<b>Generation (Years Born)<sup>8</sup></b>						
Millennial (1981-1997)	24	3.5	17	4.1	2	1.2
Generation X (1965-1980)	67	9.7	50	12.0	16	9.6
Baby Boomer (1946-1964)	202	29.2	126	30.1	52	31.1
Silent (1929-1945)	232	33.5	136	32.5	53	31.7
Greatest (1900-1928)	167	24.1	89	21.3	44	26.3
Total	692	100.1	418	100.0	167	99.9 <sup>9</sup>

<sup>5</sup> Does not equal 100% due to rounding.

<sup>6</sup> Does not equal 100% due to rounding.

<sup>7</sup> Does not equal 100% due to rounding.

<sup>8</sup> 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.

<sup>9</sup> Does not equal 100% due to rounding.

# Services Coordinated

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

Of the survey respondents, 159 indicated one or more services with which their case managers provided coordination assistance.

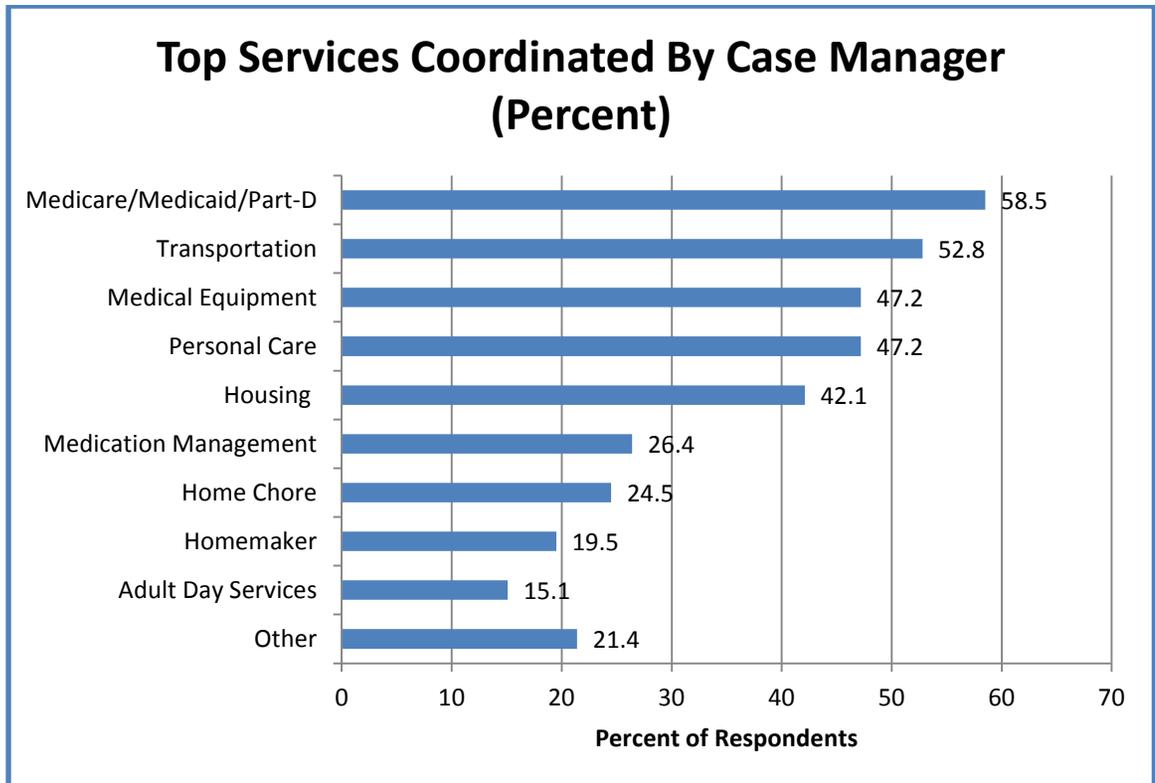
The most frequently cited assistance (59%) was helping with paperwork associated with Medicare/Medicaid/ Medicare Part D.

Services critical to helping persons remain in their own home, such as, transportation (53%), medical equipment (47%), personal care (47%), medication management (26%), and home chore services (25%) were coordinated.

Case managers provided assistance with housing (42.1%) whether it was finding senior housing or an assisted living facility that would allow respondents the level of care needed outside of a nursing home.

The category of other included: clothing, home modifications, information, paperwork, financial management, and other related services. As one respondent put it, "Whatever I need."

**Graph 1: Most Frequently Cited Services Coordinated by Case Manager**



N = 159. Respondents could cite more than one service.

# Participation in Service Planning

An Individual Service Plan (ISP) is required to be developed for each person certified under the COP-W and CIP II waiver programs. The ISP is a summary of the individual's package of supports and services. It is to be consistent with information about needs, services and preferences identified in the Assessment/ Supplement and it is to reflect both formal and informal supports. It is also a document that lists the things that are important to the individual and what he/she hopes to maintain or achieve as it pertains to his/her health, welfare, socialization, etc.

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

Survey respondents indicated that their case managers involved them in discussing and planning their services (94%) and that they were able to select the services they received (92%).

While nearly 74% of survey respondents indicated they received a copy of their care plan, around 13% didn't know.

Service quality was further examined based on the gender, race/ethnic status, and generation of survey respondents. No significant differences were found.

**Table 5:** Involvement in Service Planning

Survey Question	Percent of Respondents			
	Yes	No	Don't Know	Resp. (N)
Does your case manager involve you in discussing and planning your services?	94.4	2.5	3.1	162
Did your case manager develop a care plan for the services you need?	84.5	3.1	12.4	161
Did you receive a copy of the care plan?	73.8	13.4	12.8	164
Are you able to select the services you receive?	92.1	7.9		151

## Sample of Comments from Survey Respondents

*Very professional and extremely pleasant and a joy to meet with or talk to and she really understands me.*

*We have not met to discuss case management services. I want to meet.*

*No recommendations - very pleased with all the services currently provided.*

*Our case worker (E) has gone above and beyond in meeting our needs. She has been good in coming up with alternate suggestions and ideas when problems arise. She is excellent in following up and seeing situations all the way through to resolution. She is also very personable and compassionate; highly professional and experienced.*

# Service Quality

Survey respondents rated their case managers highly in treating them with respect (97%), returning their phone calls in a timely manner (92%), and explaining services in a way they could understand (96%).

While the majority of respondents (89%) 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, race/ethnic status, and generation of survey respondents.

**Table 6:** Responses to Service Quality Related Questions

Survey Question	Percent of Respondents			Resp. (N)
	Yes	No	Don't Know	
Do you know how to contact your case manager when you need to?	98.1	1.9		157
Does your case manager return your phone calls in a timely manner?	92.1	3.0	4.9	164
Does your case manager explain your services in a way you can understand?	96.3	1.2	2.5	163
Does your case manager treat you with respect?	96.9	0.6	2.5	163
Does your case manager do a good job setting up services (transportation, meals, medical appointments, etc.) for you? <sup>10</sup>	88.5	5.8	5.8	156

Sample of Comments from Survey Respondents

*M is very caring and helpful. She listens and follows through in a quiet, respectful, non-abrasive way.*

*E has been extremely helpful. He is personable, yet professional. He always treats \_\_\_\_ with dignity and respect. He is very considerate of her cognitive level. We all appreciate very much E being a part of \_\_\_\_'s care team!*

*R is an excellent case manager who has helped us so much. She is knowledgeable, kind and caring. We feel very fortunate to have her. She is wonderful.*

<sup>10</sup> Row total does not equal 100% due to rounding.

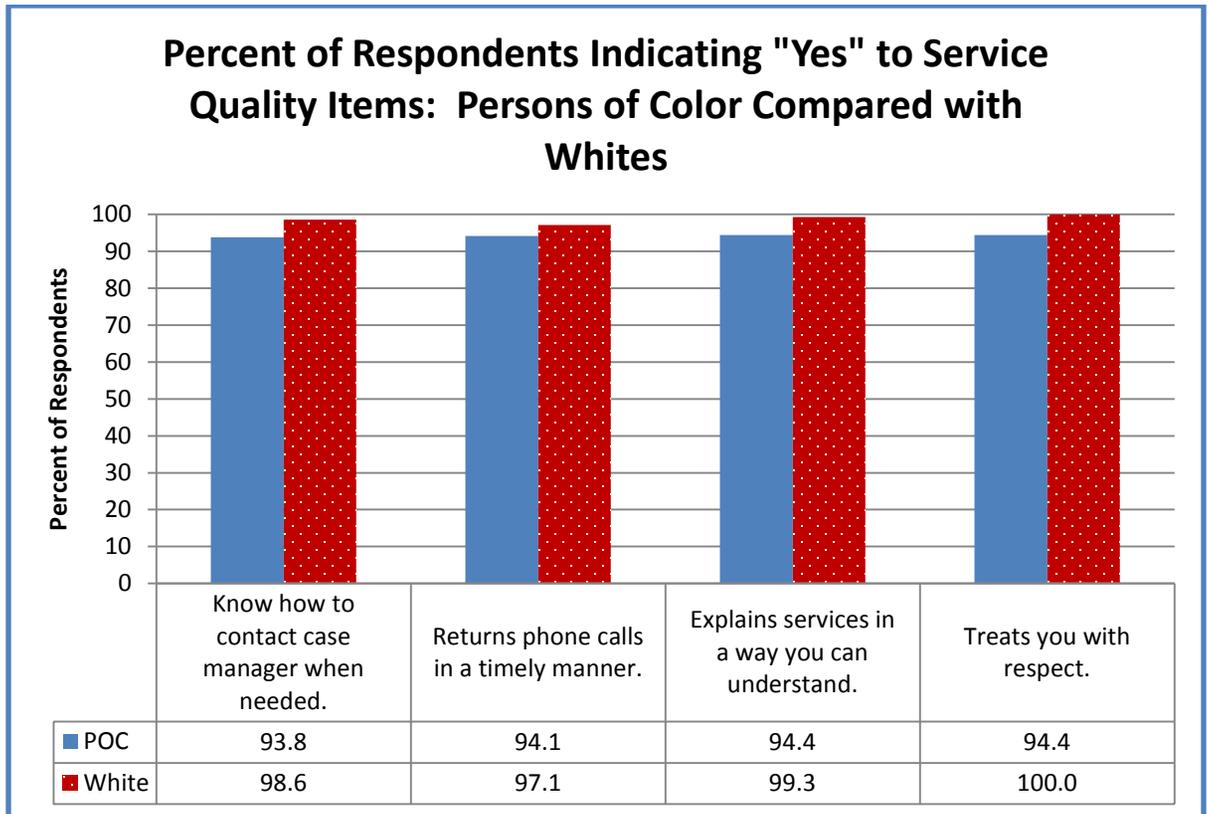
Responses to survey items related to service quality were compared for People of Color (those with a racial/ethnic background of Hispanic/Latinx, African-American/Black, Asian, Pacific Islander, Native American) and those considered White/Caucasian. As seen in Graph 2, there was some variation between how People of Color and Whites perceived the quality of services.

People of Color were slightly less likely than Whites to indicate that they knew how to contact their case manager when needed, their case managers returned their phone calls in a timely manner, and explained services in a way they could understand. None of these variations was statistically significant.

However, Persons of Color were significantly less likely to indicate their case manager treated them with respect (94%) compared with respondents who were White (100%).<sup>11</sup>

There were no significant differences on these items based on gender or generation.

**Graph 2:** Comparison of Responses to Items Related to Quality of Services for People of Color and Whites



N for people of color = 16 for know how to contact, 17 for returning phone calls, 18 for explaining services and treating with respect. N for Whites = 141 for know how to contact, explaining services, and treating with respect; 139 for phone calls.

<sup>11</sup>  $\chi^2 = 7.8829, df=1, p<.05.$

# Overall Quality

An overwhelming majority of survey respondents (98.7%) were satisfied with the case management services they received.

Overall, survey respondents rated their case management services quite highly with 67% rating them as Excellent, 22% as Very Good, and 7% as Good.

Just 3.1% of the survey respondents rated case management services as fair or poor.

## Sample of Comments from Survey Respondents

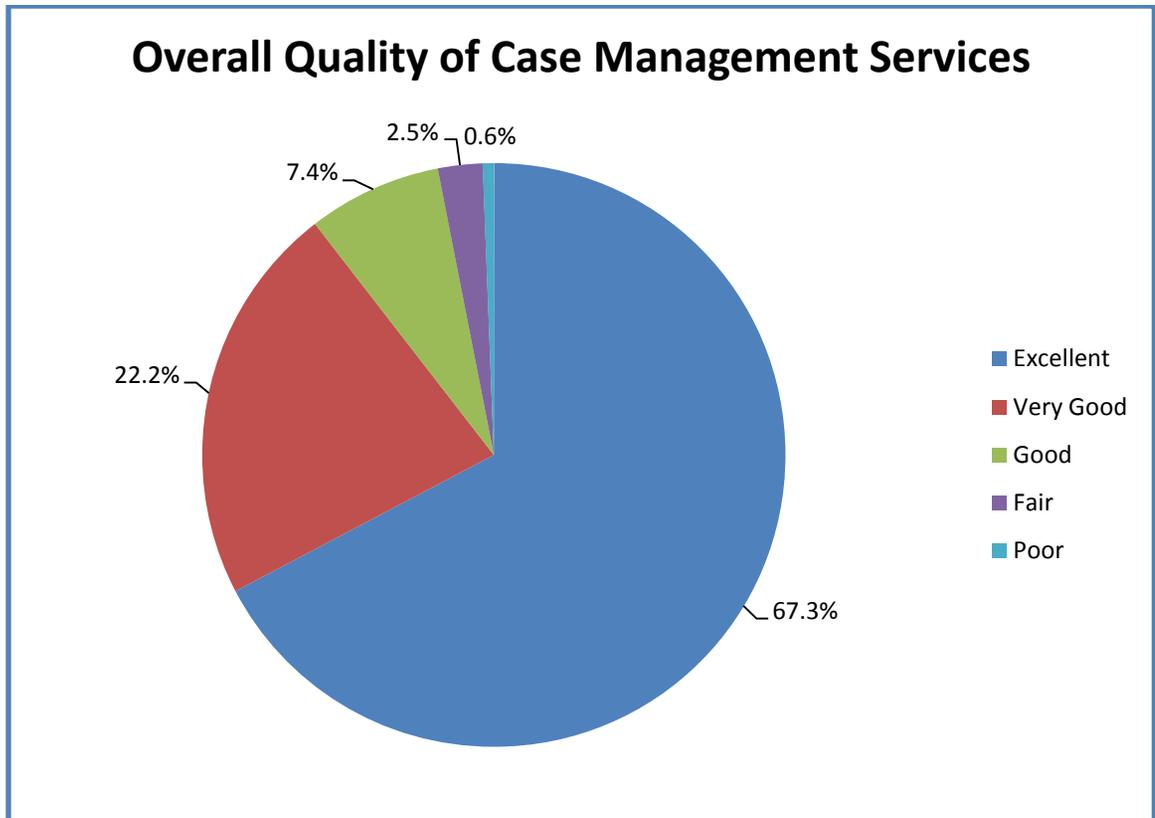
*J and L have helped me so much. I cannot say enough good things about them. Excellent in every manner. Keep up the great work!*

*She is great!*

*My case manager comes and provides hands on help with filling out forms. I find that awesome. I never knew anyone like her.*

*The case managers (3) I have had have been excellent.*

**Graph 3:** Overall Quality of Case Management Services by Percent of Respondents



N = 162

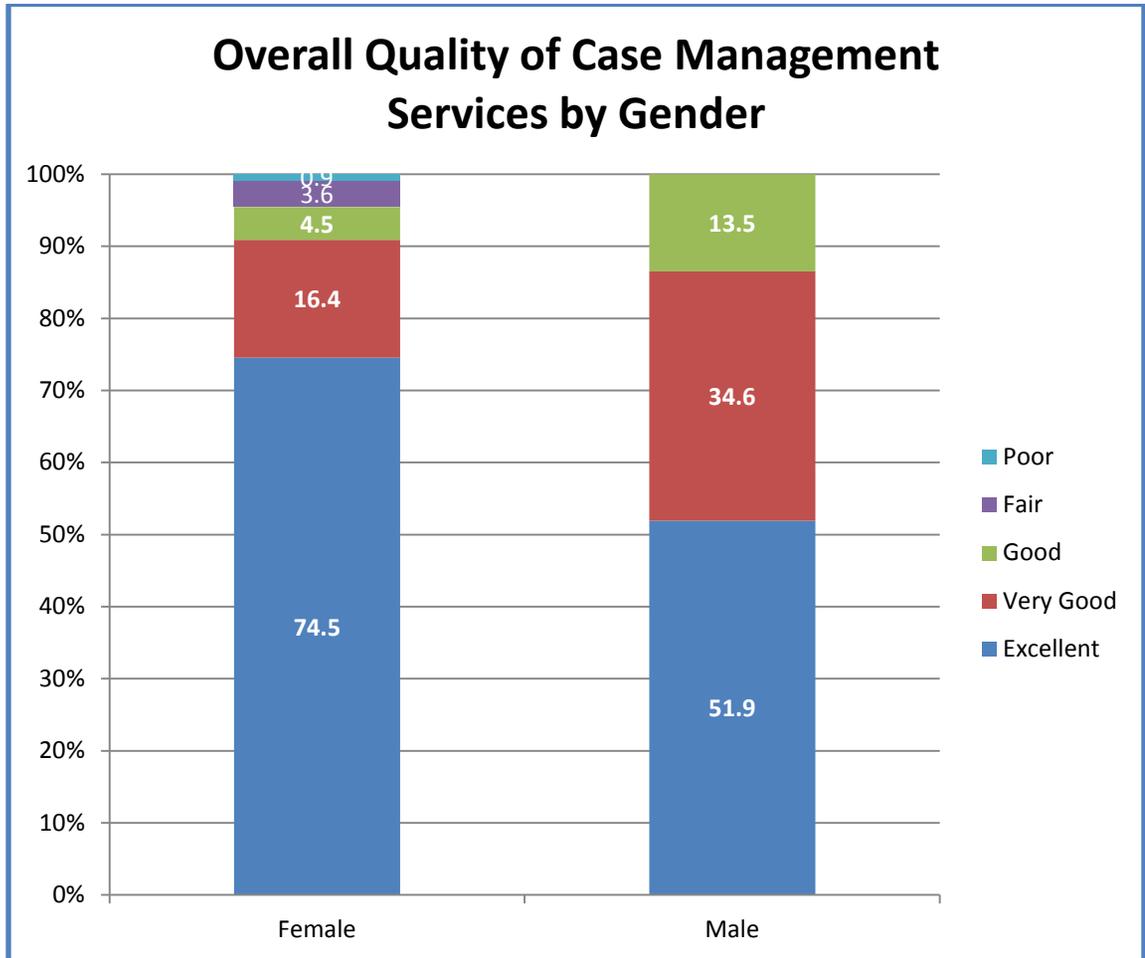
The overall quality of case management services was also examined based on gender, race/ethnic status, and generation.

Female respondents (75%) were significantly more likely than males (52%) to rate the overall quality of case management services as excellent. On the other hand, males (35%) were more likely than females (16%) to rate the services as very good. These differences between the two groups were significant.<sup>12</sup>

There was no statistically significant difference<sup>13</sup> in how people of color (those with a racial/ethnic background of Hispanic/Latinx, African-American/Black, Asian, Pacific Islander, Native American) perceived the overall quality of case management services compared with Whites/Caucasians.

Despite a smaller percentage of Generation Xers – born 1965-1980 - (88%) rating the services as excellent, very good, or good compared with the Baby Boomers - born 1946-1964 (98%), Greatest – born 1900-1928 - (100%) and Silent – born 1929-1945 - (96%) generations, this was not a significant difference.<sup>14</sup>

**Graph 4:** Comparison of Overall Quality Rating by Gender



N = 110 females, 52 males.

<sup>12</sup>  $\chi^2=14.13161, df=4, p<.05.$

<sup>13</sup>  $\chi^2=1.001147, df=4, p<.05.$

<sup>14</sup>  $\chi^2=26.05766, df=20, p<.05.$

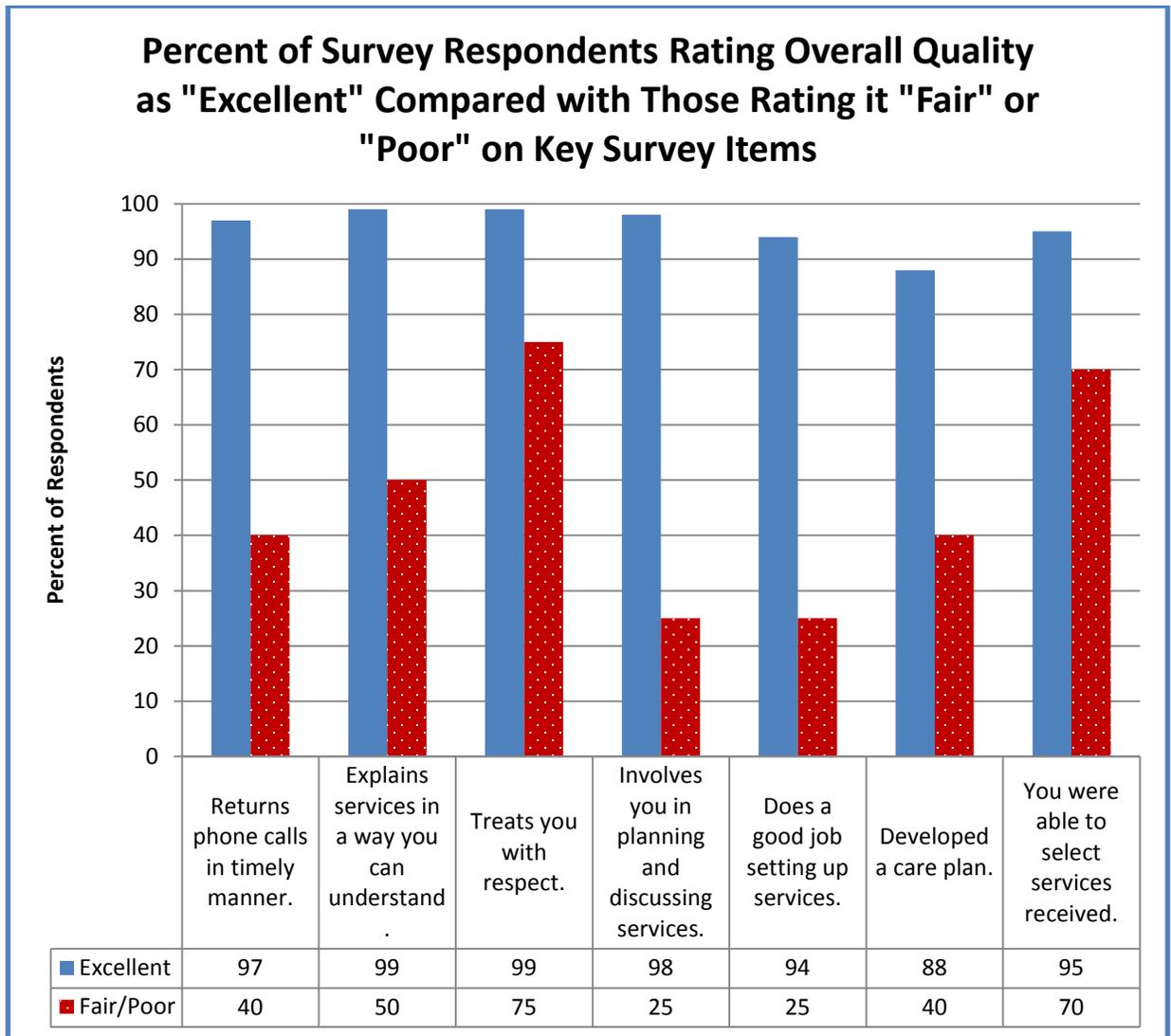
Survey respondents who rated the overall quality of case management services as “Excellent” were also more likely to rate their case manager positively compared with respondents who rated the overall quality of case management services as “Fair” or “Poor.”

Of respondents who rated the overall quality of case management services as “Excellent,” 98% indicated their case manager involved them in discussing and planning their services compared with 25% of those who rated the overall quality as “Fair” or “Poor.”

Respondents who rated the overall quality of case management services as “Excellent” were more likely than those who rated it as “Fair” or “Poor” to indicate their case managers returned their phone calls in a timely manner, explained services in a way they could understand, treated them with respect, and did a good job setting up services.

Of those who rated the overall case management services “Excellent,” 88% indicated their case manager developed a care plan for the services they needed contrasted with just 40% of those who rated the services “Fair” or “Poor.”

**Graph 5:** Comparison of Overall Quality Rating With Rating of Key Items



N = 109 for overall quality as “Excellent” and N = 5 for overall quality as Fair or Poor.

# Benefits

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

Survey respondents indicated their case manager helped them get services they did not have before (81%) and their situation was better because of their case managers' help (97%).

Of the respondents to the survey, 97% indicated case management services helped them to continue to live where they chose.

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?" On this item, 13% of respondents indicated "No." 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.

**Table 7:** 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? <sup>15</sup>	81.2	6.5	12.3	154
As a result of receiving the case management services, do you have a better idea of where to get information about other services?	87.2	12.8		156
Is your situation better because of your case manager's help?	97.4	2.6		156
Do the case management services help you continue to live where you choose?	97.4	2.6		154

Sample of Comments from Survey Respondents

*M is wonderful and so very helpful. The links she sent for information were great. I appreciate her so much.*

*C is very good at her job. She understands clients' needs and has compassion for those with special needs to live independently!*

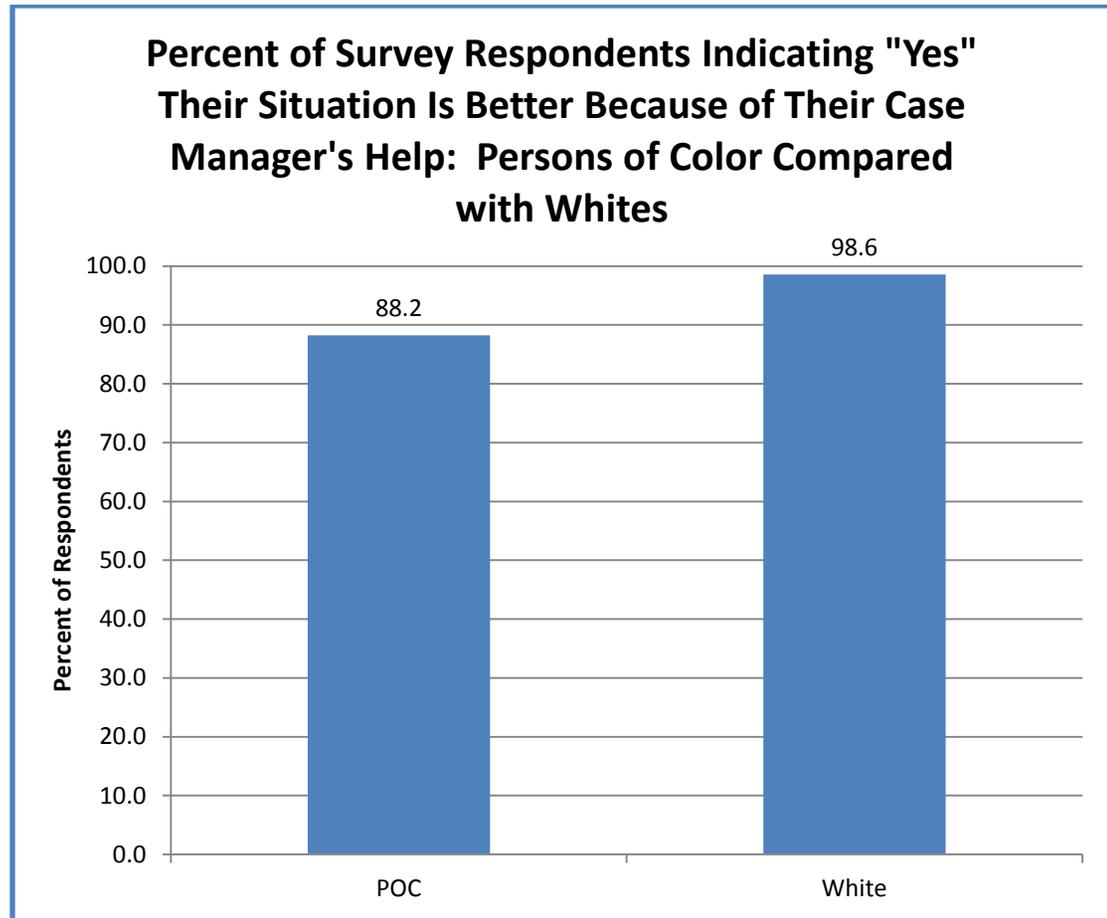
*E helped Aunt \_\_\_\_\_ remain in assisted living. She was also able to get her on Medicaid. My Aunt loves living at \_\_\_\_\_ and can stay there due to her work. Thank you!*

<sup>15</sup> Row total does not equal 100% due to rounding.

Responses to survey items related to the benefits of case management services were compared based on gender, race/ethnic status, and generation. There were no significant differences based on generation or race/ethnic status.

People of Color (those with a racial/ethnic background of Hispanic/Latinx, African-American/Black, Asian, Pacific Islander, Native American) were significantly less likely (88%) than those who were White (99%) to indicate their situation was better because of their case manager's help.<sup>16</sup>

**Graph 6:** Comparison of Responses by Persons who were White with Persons of Color Indicating 'Yes' to Question, "Is your situation better because of your case manager's help?"



N = 17 for Persons of Color and 139 for Whites.

<sup>16</sup>  $\chi^2=6.46453, df=1, p<.05.$

# Recommendations for Improvement

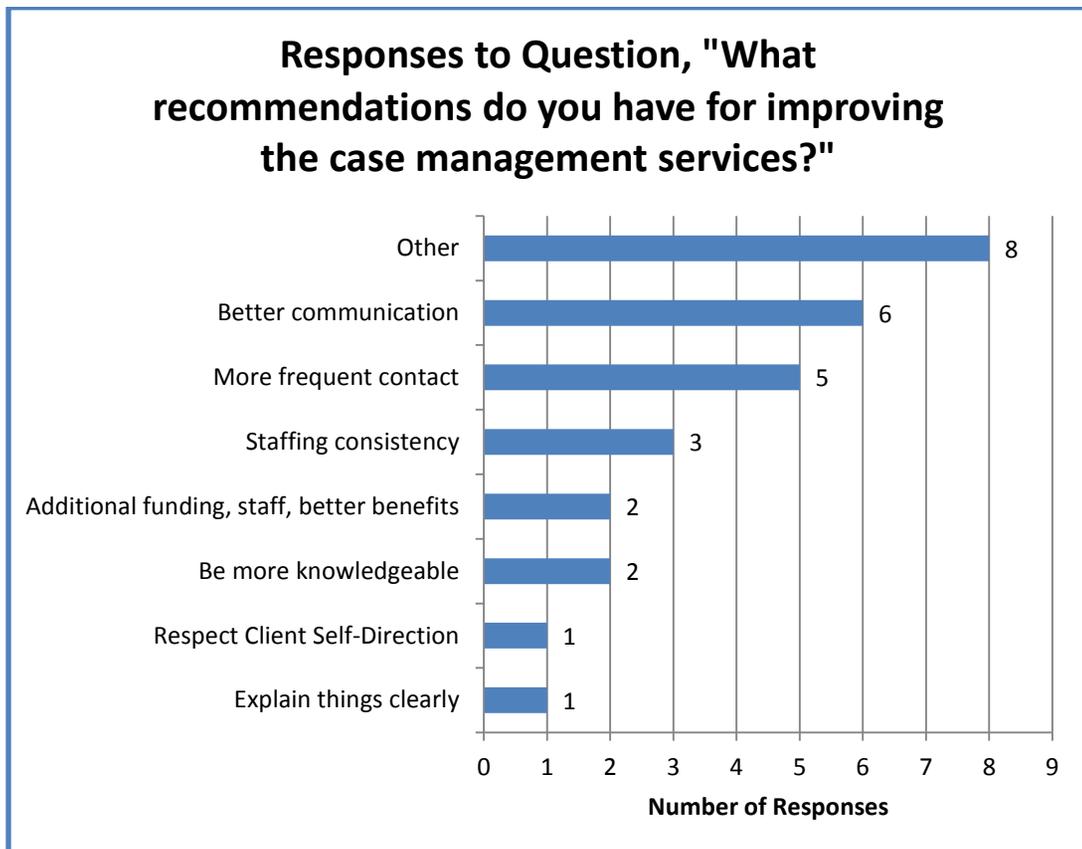
The survey had a free-form question that asked, "What recommendations do you have for improving case management services?" Of the 67 respondents to this question, 39% (26) indicated they had no recommendations for improvement and another 30% (20) had praise for the service and/or case manager as seen in the following:

- *Wish everyone should be as terrific at their job as T is!!.*
- *R is wonderful. No improvement needed!*
- *Nothing!! J is and always has been absolutely WONDERFUL to work with. The best one I have.*
- *K is so great!*

Responses for the remaining comments were grouped in one of 8 categories as seen in Graph 7.

The largest category of responses was Other which covered a range of suggestions. Some were of a personal nature, such as: wanting a new wheelchair (1). Other comments dealt with respecting the time of the client as in these:

**Graph 7:** Grouped Responses to Survey Question "What recommendations do you have for improving the case management services?"



- *To not show up without making appointment with me - makes me feel like my time is not valuable.*
- *Show up for appointments on time. Once showed up an hour early while I was bathing. The next time she was over an hour and a half late (no call...).*

Several of the recommendations in the Other category were for information, such as information on support groups or advocacy groups and help on understanding the role of CLA versus the Capitol Consortium.

Other recommendations further included: resuming the paper newsletter as not all clients have computers (1), weekend emergency help (1), and better coordination with case managers and consumers (1).

Better communication (6), staffing consistency (3) and more frequent contact (5) were also among the top recommendations.

# Results by Selected Agency

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The following section of the report presents the findings for the three agencies with 10 or more respondents. All data are based on percentages of survey respondents for each question.

Q1. Which services does your case manager help to coordinate for you? (Check all that apply). Percentage of respondents for whom service is coordinated.	Community Living Alliance	Dane County DHS	South Madison Coalition of the Elderly
Number of Survey Respondents to Question	56	61	42
Average Number of Services Coordinated Per Survey Respondent	4.4	3.6	3.7
Adult Day Services	19.6	13.1	11.9
Energy Assistance	10.7	8.2	4.8
Food Assistance/Food Stamps/SNAP	14.3	14.8	4.8
Home Chore Services	39.3	18.0	14.3
Home-Delivered Meals	7.1	11.5	0.0
Homemaker/Housekeeper	32.0	13.1	11.9
Housing Assistance	37.5	52.5	33.3
Legal Assistance	5.4	6.6	1.0
Medicare/Medicaid/Medicare Part D (Drug)	44.6	72.1	57.1
Medical Equipment (wheelchair, walker, etc.)	53.6	37.7	52.4
Medication Management	23.2	29.5	26.2
Personal Care Services	58.9	34.4	50.0
Transportation	64.3	36.1	61.9
Other	25.0	13.1	28.6

Agency	Q2. Do you know how to contact your case manager when you need to?				Q3. Does your case manager <b>return</b> your <b>phone calls</b> in a timely manner?			
	Yes	No	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
<b>Overall</b>	<b>98.1</b>	<b>1.9</b>	<b>157</b>		<b>92.1</b>	<b>3.0</b>	<b>4.9</b>	<b>164</b>
Community Living Alliance	98.2	1.8	56		88.1	6.8	5.1	59
Dane County DHS	98.3	1.7	59		95.2	0.0	4.8	62
South Madison Coalition of the Elderly	97.6	2.4	42		93.0	2.3	4.7	43

Agency	Q4. Does your case manager <b>explain</b> your <b>services</b> in a way you can understand?					Q5. Does your case manager <b>treat</b> you with respect?			
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
<b>Overall</b>	<b>96.3</b>	<b>1.2</b>	<b>2.5</b>	<b>163</b>		<b>96.9</b>	<b>0.6</b>	<b>2.5</b>	<b>163</b>
Community Living Alliance	94.9	1.7	3.4	59		96.6	0.0	3.4	59
Dane County DHS	98.4	0.0	1.6	61		98.4	0.0	1.6	61
South Madison Coalition of the Elderly <sup>17</sup>	95.3	2.3	2.3	43		95.3	2.3	2.3	43

<sup>17</sup> Row totals for Q4 and Q5 will not equal 100% due to rounding.

Agency	Q6. Does your case manager <b>involve you</b> in discussing and planning your services?					Q7. Does your case manager do a good job <b>setting up services</b> (transportation, meals, medical appointments, etc.) for you?			
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
<b>Overall</b> <sup>18</sup>	<b>94.4</b>	<b>2.5</b>	<b>3.1</b>	<b>162</b>		<b>88.5</b>	<b>5.8</b>	<b>5.8</b>	<b>156</b>
Community Living Alliance <sup>19</sup>	93.1	3.4	3.4	58		91.2	3.5	5.3	57
Dane County DHS <sup>20</sup>	96.7	0.0	3.3	61		89.5	5.3	5.3	57
South Madison Coalition of the Elderly <sup>21</sup>	93.0	4.7	2.3	43		83.3	9.5	7.1	42

Agency	Q8. Does your case manager help you get services that you did not have before?					Q9. 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	No	Don't Know	Number of Survey Respondents		Yes	No	Don't Know	Number of Survey Respondents
<b>Overall</b>	<b>81.2</b>	<b>6.5</b>	<b>12.3</b>	<b>154</b>		<b>84.5</b>	<b>3.1</b>	<b>12.4</b>	<b>161</b>
Community Living Alliance	77.8	7.4	14.8	54		84.4	1.7	13.8	58
Dane County DHS <sup>22</sup>	88.1	5.1	6.7	59		91.8	1.6	6.6	61
South Madison Coalition of the Elderly <sup>23</sup>	75.6	7.3	17.1	41		73.8	7.1	19.0	42

<sup>18</sup> Row total for Q7 does not equal 100% due to rounding

<sup>19</sup> Row total for Q6 does not equal 100% due to rounding.

<sup>20</sup> Row total for Q7 does not equal 100% due to rounding.

<sup>21</sup> Row total for Q7 does not equal 100% due to rounding.

<sup>22</sup> Row total for Q8 does not equal 100% due to rounding.

<sup>23</sup> Row total for Q9 does not equal 100% due to rounding.

Agency	Q10. Did you receive a copy of the care plan?					Q11. Are you able to select the services you receive?		
	Yes	No	Don't Know	Number of Survey Respondents		Yes	No	Number of Survey Respondents
<b>Overall</b>	<b>73.8</b>	<b>13.4</b>	<b>12.8</b>	<b>164</b>		<b>92.1</b>	<b>7.9</b>	<b>151</b>
Community Living Alliance	84.7	10.2	5.1	59		92.9	7.1	56
Dane County DHS	75.4	9.8	14.8	61		94.6	5.4	56
South Madison Coalition of the Elderly	56.8	22.7	20.5	44		87.2	12.8	39

Agency	Q12. As a result of receiving the case management services, do you have a better idea of where to get information about other services?				Q13. Is your situation better because of your case manager's help?		
	Yes	No	Number of Survey Respondents		Yes	No	Number of Survey Respondents
<b>Overall</b>	<b>87.2</b>	<b>12.8</b>	<b>156</b>		<b>97.4</b>	<b>2.6</b>	<b>156</b>
Community Living Alliance	87.9	12.1	58		96.4	3.6	56
Dane County DHS	92.9	7.1	56		98.3	1.7	58
South Madison Coalition of the Elderly	78.6	21.4	42		97.6	2.4	42

Agency	Q15. Are you satisfied with the case management services you receive?				Q16. Do the case management services help you continue to live where you choose?		
	Yes	No	Number of Survey Respondents		Yes	No	Number of Survey Respondents
<b>Overall</b>	<b>98.7</b>	<b>1.3</b>	<b>157</b>		<b>97.4</b>	<b>2.6</b>	<b>154</b>
Community Living Alliance	96.6	3.4	58		96.4	3.6	56
Dane County DHS	100.0	0.0	58		98.3	1.7	59
South Madison Coalition of the Elderly	100.0	0.0	41		97.4	2.6	39

Agency	Q.17 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
<b>Overall</b>	<b>67.3</b>	<b>22.2</b>	<b>7.4</b>	<b>2.5</b>	<b>0.6</b>	<b>162</b>
Community Living Alliance	61.0	23.7	10.2	3.4	1.7	59
Dane County DHS	80.0	20.0	0.0	0.0	0.0	60
South Madison Coalition of the Elderly <sup>24</sup>	58.1	23.3	14.0	4.7	0.0	43

<sup>24</sup> Row total does not equal 100% due to rounding.

## **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**» 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 **Friday, November 11, 2016**.

**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.	Legal Assistance	<input type="checkbox"/>	1
i.	Medicare / Medicaid / Medicare Part D (Drug)	<input type="checkbox"/>	1
j.	Medical Equipment (wheelchair, walker, etc.)	<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
<b>List: _____</b>			

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 <b>return</b> your <b>phone calls</b> in a timely manner?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
4.	Does your case manager <b>explain</b> your <b>services</b> in a way you can understand?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
5.	Does your case manager <b>treat</b> you with respect?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
6.	Does your case manager <b>involve you</b> 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 <b>setting up services</b> (transportation, meals, medical appointments, etc.) for you?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
8.	Does your case manager help <b>you get services</b> that you did not have before?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3

9. 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

10. Did you receive a copy of the care plan?

- Yes.....  1  
 No.....  2  
 Don't know.....  3

11. Are you able to select the services you receive?

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

**12. 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

**13. Is your situation better because of your case manager's help?**

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

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

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**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 where you choose?**

- 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 manager or case management services.**

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**19. 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

**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/4<sup>th</sup> FL  
Madison, WI 53704

Survey No. «Survey\_No»

Consumer Survey 2016 – LTS - Case Management – Results.docx