

Survey of Case Management Services for Older Adults in Dane County

January 1, 2015 – August 31, 2015



January 2016

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 15 geographically-based senior focal points.

Case management services are funded primarily by Dane County General Purpose Revenue (GPR). A small amount of 2015 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 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

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>

County, these dollars are used to provide this outreach through ten (10) of the senior focal point case management programs.

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

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

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

The 2015 AAA Access Committee Work Plan had a benchmark to "conduct satisfaction surveys for all Title III funded programs in 2015."³

II. Study Purpose

The purpose of the survey as stated in the 2014 Plan was to measure client satisfaction of case management services with the goal of using this input "in order to improve program efficiency and ensure the program is effectively helping senior adults" (p.4).

III. Data Collection

Measures

The mail version of the Case Management Survey of the Administration on Aging, Performance Outcome Measures Project (POMP), available at: http://www.aoa.acl.gov/Program_Results/POMP/CaseManagement.aspx, served as the base instrument. That instrument, developed beginning in 2002, has been used in

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

³ AAA Access Committee, *2015 AAA Access Committee Work Plan: Quarter 1 Adopted by AAA Access Committee 3/2/2015*, (Madison, Wisconsin, 2015), p.3.

looking at performance nationally. Using it for this study allowed for comparison to national and regional data available at <http://www.agid.acl.gov/>.

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

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

Decisions were made to:

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

Revisions to the survey were made in 2015 to address some of the issues cited in the prior year's report:

- In the list of services to be coordinated, added in Medicare Part D (Drug) to the list for Medicare/Medicaid.
- Added durable medical equipment, e.g., wheelchairs and walkers, to the list of services the case manager helps to coordinate.

- In the list of services to be coordinated, shortened the spacing between the checkboxes to help respondents and data entry staff select intended boxes.
- Added “Does Not Apply” to the series of questions on the quality of services, e.g., returning phone calls in a timely manner or doing a good job of setting up services, given that some respondents previously indicated they did not call their case manager nor did the case manager set up services for them.
- Added in a question regarding whether the person completed the survey on his/her own or if someone assisted him/her.
- Revised the question regarding whether case management services helped the individual to continue to live at home to whether the case management services help you continue to live where you choose.
- Eliminated the free-form questions for comments about the case manager and how the case management services have helped to make the survey easier to complete for persons with arthritis or other conditions limiting their capability to write.

The final survey was 17 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.

The North/Eastside Senior Coalition (NESCO), which has a contract for bilingual case management services for Dane County seniors, identified their clients who were to receive the Spanish/English version of the survey. A total of 31 Spanish/English versions of the surveys were mailed.

Survey Population

A query in InfoMaker was used by the Senior Program Analyst in the Planning and Evaluation Unit with DCDHS to pull a listing of all clients in the DCDHS Information System who received case management services between January 1, 2015, and July 31, 2015, and who were reported into the DCHS Information System. This was generated on August 25, 2015, 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 August 28, 2015, to Cheryl Batterman, 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.
- Completed spreadsheets were returned by Noon on Friday, September 18.

Agencies 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.

Several agencies contacted either the AAA Manager or the Senior Program Analyst indicating that their lists of clients were incomplete. This appeared primarily due to clients without addresses being excluded from the initial query. While client addresses are to be provided at the time a client is new to the system, that is not always the case. There have also been issues where due to insufficient time, the entry of client addresses into the DCDHS Information System has had a lower priority. Revised lists of clients were run for the Colonial Club, East Madison/Monona Coalition, and the Oregon Area Senior Center.

The majority of the spreadsheets were returned on or by the September 18 deadline with the final one arriving on September 23. In reviewing the lists, it appeared that they were updated to include clients served through August 2015.

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 1,964 rows of clients, 186 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	74	39.8
No contact in 2015	9	4.8
Moved	23	12.4
Duplicates	3	1.6
Moved to a Nursing Home	4	2.2
Moved to Assisted Living	10	5.4
Moved to another Facility (includes Hospice)	8	4.3
Not appropriate per case manager	32	17.2
Changed service areas	8	4.3
Homeless	3	1.6
Unknown client	1	0.5
Other Reasons (includes other placement (9), language barrier (1), and no connection (1)).	11	5.9
Total	186	100.0

The category of “not appropriate per case manager” was used solely by North/Eastside Senior Coalition (NESCO) and was used to denote persons who requested no mail, no contact, or who had mental health concerns.

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 1,200 then being included in the survey mailing.

Survey Method

A total of 1,140 survey forms were mailed October 5 – 7, 2015.⁴ 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 136 forms returned with bad addresses, 60 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 4-6 digit tracking number associated with it that was linked with demographics of the potential respondent. This was to assist with any second.

⁴ An additional 60 survey forms for persons receiving M.A. case management services were also mailed out. This report deals just with the County GPR-funded case management services.

mailings, 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 Not Re-mailed	Surveys to Clients
Colonial Club Senior Activity Center	121	10	111
DeForest Area Community & Senior Center	32	4	28
East Madison/Monona Coalition of the Aging (EMMCA)	146	9	137
Fitchburg Senior Center	54	4	50
McFarland Senior Outreach Services	34	2	32
Middleton Senior Center	16	2	14
North/Eastside Senior Coalition (NESCO)	69	14	55
Northwest Dane Senior Services	39	1	38
Oregon Area Senior Center	74	0	74
South Madison Coalition of the Elderly (SMCE)	97	14	83
Southwest Dane Senior Outreach	52	2	50
Stoughton Area Senior Center	84	2	82
Sugar River Senior Center	38	0	38
Waunakee Senior Center	120	1	119
West Madison Senior Coalition (WMSC)	164	11	153
Total	1,140	76	1,064

Response Rate

The overall response rate was 39.5%; 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.

Sample of Comments From Surveys That Were Excluded

I do not, nor have I received any services from Senior Center. I do not have a case manager as I do not have a case. I take care of myself and have family if I need help. I should not be listed as a client.

I had no knowledge that I had a case manager.

I have never heard of the above named [case manager].

Why did I get this? I do not use it - know nothing about.

Don't know her. I received no services in 2015 and didn't even know a case manager was assigned. If someone called on these services I can't recall it! A few select ones would have been nice.

My mother,... died September., 2015. She has never received a call, letter, or visit from [case manager]. I have never heard of this person, neither have my siblings. We could have really used some help as my mother's health declined, especially these last 2 years. She did receive some of the services from Dane County, such as food stamps, energy assistance, etc., but never had a case manager. I hope this letter provides some insight in what the Department can do better so someone won't get missed. Thank you.

Table 3: Response Rate by Agency

Agency	Surveys to Clients	Surveys Returned	Surveys Excluded	Useable Surveys	Response Rate
Colonial Club Senior Activity Center	111	57	3	54	48.6
DeForest Area Community & Senior Center	28	17	1	16	57.1
East Madison/Monona Coalition of the Aging (EMMCA)	137	42	5	37	27.0
Fitchburg Senior Center	50	25	0	25	50.0
McFarland Senior Outreach Services	32	20	0	20	62.5
Middleton Senior Center	14	6	0	6	42.9
North/Eastside Senior Coalition (NESCO)	55	17	4	13	23.6
Northwest Dane Senior Services	38	19	1	18	47.4
Oregon Area Senior Center	74	39	0	39	52.7
South Madison Coalition of the Elderly (SMCE)	83	19	0	19	22.9
Southwest Dane Senior Outreach	50	19	2	17	34.0
Stoughton Area Senior Center	82	36	1	35	42.7
Sugar River Senior Center	38	11	2	9	23.7
Waukegan Senior Center	119	63	0	63	52.9
West Madison Senior Coalition (WMSC)	153	56	7	49	32.0
Total	1,064	446	26	420	39.5

The 26 survey forms shown in Table 3 as excluded for analysis all indicated that services had not been received in 2015.

The response rate for the English/Spanish surveys was 12.9% with 4 of the 31 surveys returned. Nearly 30% of these surveys were returned due to bad addresses with forwarding addresses provided by the U.S. Postal Service for just three.

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
- Service Quality
- Participation in Service Planning
- Overall Quality
- Benefits
- Recommendations for Improvement
- Results by Contracted Agency

Briefly, some of the findings include:

- Survey respondents rated their case managers highly in “Always” treating them with respect (98.7%), returning their telephone calls in a timely manner (93.5%), explaining services in a way they could understand (93.5%), and in involving them in discussing and planning their services (93.2%).
- The length of time that services had been received affected how respondents rated some items on the survey. Survey respondents who received services for three years or longer were significantly less likely to indicate their case manager involved them in discussing and planning their services. Respondents who received case management services between 13 and 18 months were significantly less likely to indicate their case manager “Always” did a good job of setting up services for them.

- Survey respondents indicated that their case managers helped them get services they did not have before (88%), that their situations were better because of their case managers' help (95%), and the case management services helped them continue to live where they chose (93%).
- The results for 2015 are very similar to results from the 2014 survey. For both years, survey respondents rated case management services they received quite highly, with 96% rating them as excellent, very good, or good.

V. Limitations

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

- The study was conducted by staff from the Planning and Evaluation Unit with the Dane County Department of Human Services rather than an independent third party.
- All useable surveys returned by December 14, 2015 were included in the data analysis rather than a stratified sample or a sampling of surveys based on the percent of clients served.
- 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:

- With the advent of the Aging & Disability Resource Center (ADRC) which provides information and assistance services, the County no longer pays for case managers to provide this service. This may be eliminated from the list of services case managers help to coordinate.

- Examining methods to increase the response rate among persons of color or to 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 setting 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 Board of Directors
- Health and Human Needs Committee (HHNC) of the County Board
- General public via posting on the AAA web site

Additionally,

- Comments attributable to individual senior focal points will be shared with them.
- The survey instrument will be revised to address issues raised in the section of this report on future studies.
- A 1-2 page synopsis of the report will be developed.
- The County Executive's Office will be encouraged to develop a press release coinciding with the release of the report to increase awareness of this valuable Dane County service.

Demographics

During the period of January 1, 2015, through August 31, 2015, 1,964 unduplicated clients received 1,978 Dane County funded case management services. A small number of clients received services from more than one provider due to moving between service areas.

Survey respondents were representative of clients served during the study period in terms of gender and average length of service but not in terms of race/ethnicity or age.

While 72% of the respondents to the survey were female compared with 68% of those who received services during the study period, this was not statistically significant.⁵

As shown in Table 4, respondents were more likely to be White (93.8%) than clients served during the study period (88.3%).⁶

They were also over one year older. The average age of respondents was 78.6 compared with 77.4 for persons 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	
	No.	Percent	No.	Percent	No.	Percent
Gender						
Female	1,341	68.3	808	70.9	303	72.1
Male	623	31.7	332	29.1	117	27.9
Total	1,964	100.0	1,140	100.0	420	100.0
Race/Ethnicity						
Asian	21	1.1	12	1.1	3	0.7
Af. Amer/Black	124	6.3	68	6.0	11	2.6
Hispanic/Latino	66	3.4	29	2.5	9	2.1
Native American	2	0.1	0	0.0	0	0.0
Pacific Islander	1	<0.1	1	<0.1	0	0.0
White	1,734	88.3	1,019	89.4	394	93.8
Unknown	16	0.8	11	1.0	3	0.7
Total	1,964	100.0	1,140	100.0	420	99.9 ⁷
Age at Survey						
50-54	0	0.0	2 ⁸	0.2	0	0.0
55-59	12	0.6	5	0.4	3	0.7
60-64	205	10.4	125	11.0	34	8.1
65-69	358	18.2	204	17.9	59	14.0
70-74	281	14.3	164	14.4	64	15.2
75-79	273	13.9	165	14.5	62	14.8
80-84	320	16.3	179	15.7	73	17.4
85-89	288	14.7	175	15.4	75	17.9
90-94	171	8.7	93	8.2	36	8.6

⁵ $\chi^2 = 2.41324$, $df=1$, $p<.05$

⁶ $\chi^2 = 12.21865$, $df=5$, $p<.05$

⁷ Does not equal 100% due to rounding.

⁸ Presumably due to individuals added by agencies that had not yet been reported to DCDHS as clients.

Respondents ranged in age from 55 to 104. It should be noted that in accordance with DCDHS contracts with providers, persons must be age 60 and older to be eligible for this service.

At the time the survey forms were mailed, respondents had received services between 5 days and 10.8 years. Slightly over 29% of the clients served during the study period received case management services for over three years contrasted with 28.8% of those who responded to the survey. Overall, respondents to the survey were representative of clients served during the study period in terms of length of time receiving case management services.⁹

Agencies with response rates higher than the overall response rate of 39.5% as shown in Table 3 will be over-represented in the analysis. Those with lower response rates, such as all of the City of Madison sites, will be under-represented.

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

Characteristic	Clients Served		Surveys Mailed		Respondents	
	No.	Percent	No.	Percent	No.	Percent
95-99	45	2.3	23	2.0	10	2.4
100-104	8	0.4	4	0.4	4	1.0
105+	2	0.1	1	0.1	0	0.0
Unknown	1	<0.1	0	0.0	0	0.0
Total	1,964	100.0	1,140	100.2 ¹⁰	420	100.1 ¹¹
Length of Time Receiving Case Management Services as of 10.5.2015						
< 6 months	426	21.7	222	19.5	88	21.0
6-12 months	363	18.5	238	20.9	87	20.7
13-18 months	227	11.6	137	12.0	45	10.7
19-24 months	170	8.7	109	9.6	46	11.0
25-30 months	122	6.2	68	6.0	21	5.0
31-36 months	78	4.0	37	3.2	12	2.9
36 months+	578	29.4	329	28.9	121	28.8
Total	1,964	100.1 ¹²	1,140	100.1 ¹³	420	100.1 ¹⁴

¹⁰ Does not equal 100% due to rounding.

¹¹ Does not equal 100% due to rounding.

¹² Does not equal 100% due to rounding.

¹³ Does not equal 100% due to rounding.

¹⁴ Does not equal 100% due to rounding.

⁹ $\chi^2 = 5.260967$, $df=6$, $p<.05$

Municipalities

As of November 9, 2015, the Town of Windsor legally became the Village of Windsor. The clients served, surveys mailed, and respondents in Table 5 reflect this change.

Clients who received case management services between January 1, 2015, and August 31, 2015, resided in nearly every municipality in Dane County. Five of the 61 municipalities in the County were not represented: the City of Edgerton, a portion of which is in Dane County; the Towns of Medina and York; and the Villages of Dane and Shorewood Hills. All except the City of Edgerton were represented in 2014.

Respondents to the survey were more likely to reside in towns and villages than in cities that comprise the County in contrast with the number of clients served. This was driven primarily by the low response rate in the City of Madison which comprised 32.8% of the population served but just 24.3% of the survey respondents.

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

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

Municipality	Clients Served		Surveys Mailed		Respondents	
	No.	Percent	No.	Percent	No.	Percent
Cities	1,118	56.9	673	59.0	215	51.2
Edgerton	0	0.0	0	0.0	0	0.0
Fitchburg	104	5.3	55	4.8	24	5.7
Madison	645	32.8	401	35.2	102	24.3
Middleton	62	3.2	18	1.6	6	1.4
Monona	78	4.0	47	4.1	15	3.6
Stoughton	121	6.2	73	6.4	34	8.1
Sun Prairie	106	5.4	78	6.8	34	8.1
Verona	2	0.1	1	0.1	0	0.0
Towns	242	12.3	145	12.7	64	15.2
Albion	3	0.2	2	0.2	1	0.2
Berry	5	0.3	3	0.3	1	0.2
Black Earth	2	0.1	0	0.0	0	0.0
Blooming Grove	8	0.4	1	0.1	0	0.0
Blue Mounds	3	0.2	3	0.3	1	0.2
Bristol	10	0.5	9	0.8	5	1.2
Burke	4	0.2	1	0.1	1	0.2
Christiana	2	0.1	2	0.2	2	0.5
Cottage Grove	6	0.3	4	0.4	0	0.0
Cross Plains	10	0.5	4	0.4	2	0.5
Dane	6	0.3	5	0.4	2	0.5
Deerfield	2	0.1	2	0.2	1	0.2
Dunkirk	8	0.4	6	0.5	1	0.2
Dunn	7	0.4	2	0.2	1	0.2
Madison	17	0.9	7	0.6	3	0.7
Mazomanie	9	0.5	4	0.4	0	0.0
Medina	0	0.0	0	0.0	0	0.0
Middleton	2	0.1	0	0.0	0	0.0

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

Municipality	Clients Served		Surveys Mailed		Respondents	
	No.	Percent	No.	Percent	No.	Percent
Towns						
Montrose	7	0.4	6	0.5	3	0.7
Oregon	24	1.2	16	1.4	8	1.9
Perry	2	0.1	0	0.0	0	0.0
Pleasant Springs	2	0.1	2	0.2	2	0.5
Primrose	5	0.3	4	0.4	2	0.5
Roxbury	4	0.2	2	0.2	2	0.5
Rutland	3	0.2	3	0.3	3	0.7
Springdale	4	0.2	4	0.4	1	0.2
Springfield	11	0.6	5	0.4	2	0.5
Sun Prairie	4	0.2	1	0.1	1	0.2
Vermont	3	0.2	1	0.1	0	0.0
Verona	10	0.5	5	0.4	1	0.2
Vienna	5	0.3	4	0.4	2	0.5
Westport	54	2.7	37	3.2	16	3.8
York	0	0.0	0	0.0	0	0.0
Villages	458	23.3	282	24.7	137	32.6
Belleville	30	1.5	23	2.0	2	0.5
Black Earth	21	1.1	9	0.8	5	1.2
Blue Mounds	8	0.4	6	0.5	4	1.0
Brooklyn	4	0.2	1	0.1	1	0.2
Cambridge	7	0.4	7	0.6	5	1.2
Cottage Grove	14	0.7	10	0.9	8	1.9
Cross Plains	16	0.8	8	0.7	5	1.2
Dane	0	0.0	0	0.0	0	0.0
Deerfield	2	0.1	1	0.1	0	0.0
DeForest	52	2.6	25	2.2	12	2.9
Maple Bluff	3	0.2	2	0.2	1	0.2

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

Municipality	Clients Served		Surveys Mailed		Respondents	
	No.	Percent	No.	Percent	No.	Percent
Villages						
Marshall	7	0.4	4	0.4	2	0.5
Mazomanie	20	1.0	6	0.5	3	2.7
McFarland	24	1.2	15	1.3	8	1.9
Mount Horeb	42	2.1	34	3.0	11	2.6
Oregon	84	4.3	57	5.0	28	6.7
Rockdale ¹⁵	0	0.0	0	0.0	1	0.2
Shorewood Hills	0	0.0	0	0.0	0	0.0
Waunakee	112	5.7	70	6.1	39	9.3
Windsor	12	0.6	4	0.4	2	0.5
Other	146	7.4	40	3.5	4	1.0
Post Office Box	5	0.3	4	0.7	1	0.2
Current address is out of County	11	0.6	9	0.8	1	0.2
Current address is out of state	10	0.5	9	0.8	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	120	6.1	18	1.6	2	0.5
Total ¹⁶	1,964	99.9	1,140	99.9	420	100.0

¹⁵ Represents client who moved since initial mailing.

¹⁶ Percentages will not equal 100% due to rounding.

Services Coordinated

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

Of the survey respondents, 404 indicated one or more services with which their case managers provided coordination assistance.

The most frequently cited assistance was providing information and assistance (54%). Helping with paperwork associated with Medicare/Medicaid/ Medicare Part D was cited by 35% of respondents.

Case managers provided assistance with applying for benefits such as energy assistance (24%) and food assistance/ Food Stamps/Supplemental Nutritional Assistance Program (28%) that helped to extend one's income.

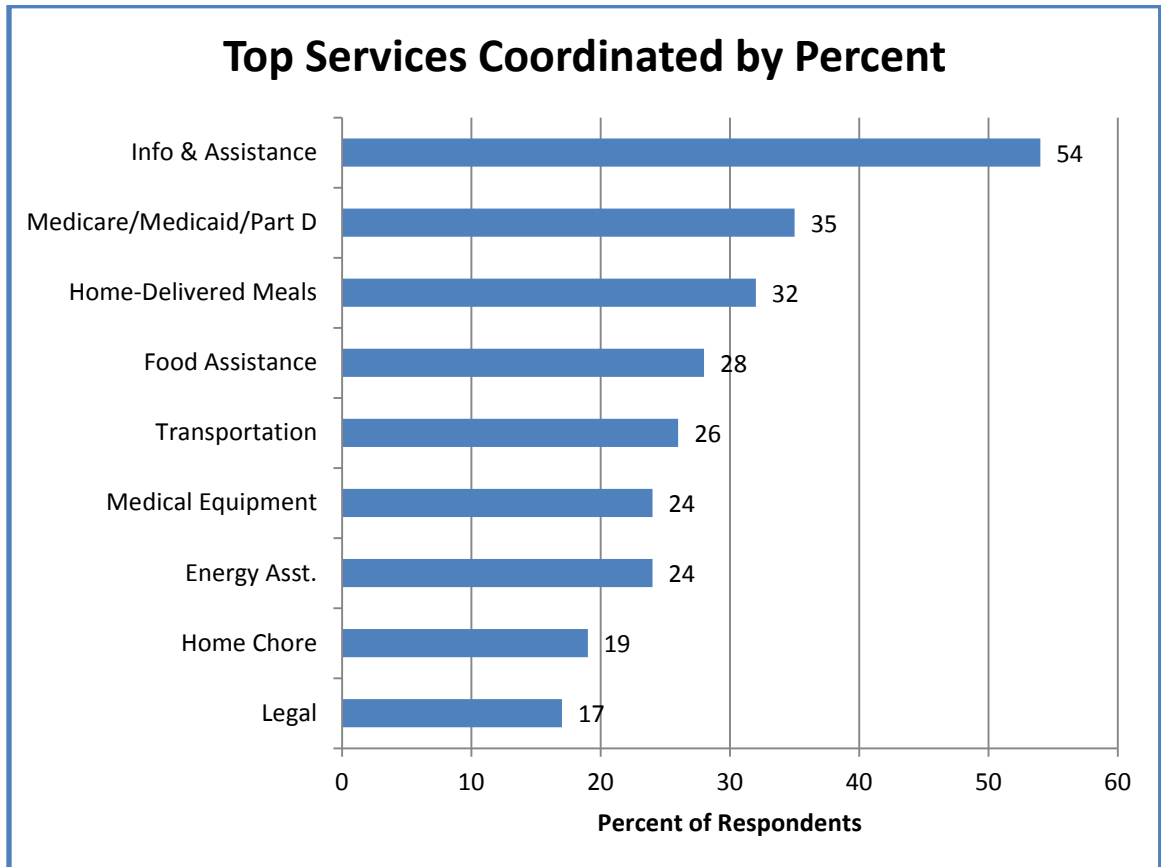
Services critical to helping persons remain in their own home, such as home-delivered meals (32%), transportation (26%), medical equipment (24%), and home chore services (19%) were also coordinated.

Sample of Survey Comments

[Case Manager] cop[ies] papers so I can read/make them bigger.

[Case Manager] has been a great contact person and helps whenever there is a question.

Graph 1: Most Frequently Cited Services Coordinated by Case Manager



N = 404. Respondents could cite more than one service.

Service Quality

Survey respondents rated their case managers highly in “always” treating them with respect (98.7%), returning their phone calls in a timely manner (93.5%), and explaining services in a way they could understand (93.5%).

This is comparable to results from the 2014 survey in which 98.2% of survey respondents indicated their case managers “Always” treated them with respect, 92.9% indicated their case managers returned their phone calls in a timely manner, and 93% indicated their case managers explained services in way they could understand.

The question on whether the case manager does a good job of setting up services was considered “not applicable” by 30% of the survey respondents. While nearly 91% of those who addressed this question indicated their case managers did a good job of setting up services, 1.5% indicated “never” and 7.5% indicated “sometimes.” In 2014, 89.3% of survey respondents indicated their case managers “Always” did a good job of setting up services.

Table 6: Responses to Service Quality Related Questions

Survey Question	Percent of Respondents			
	Always	Sometimes	Never	Resp. (N)
Does your case manager return your phone calls in a timely manner?	93.5	6.2	0.3	371
Does your case manager explain your services in a way you can understand?	95.3	4.7	0.0	386
Does your case manager treat you with respect?	98.7	1.0	0.3	396
Does your case manager do a good job setting up services (transportation, meals, medical appointments, etc.) for you?	90.9	7.5	1.5	265

Sample of Comments from Survey Respondents

She was helpful in selecting my insurance. Explained all of my options.

Very disappointed - haven't heard from my CM in a month. Previously service was good.

I have good communication with [Case Manager] and enjoy having her help me.

I have to wait too long for a call back.

"SHE" is excellent and courteous always. So helpful and explains everything (good or bad).

Please slow down and explain more in detail, use the telephone less and try to listen more to person who doesn't think as fast or understand.

She treats you as a person who needs understanding.

Very friendly, knowledgeable and helpful.

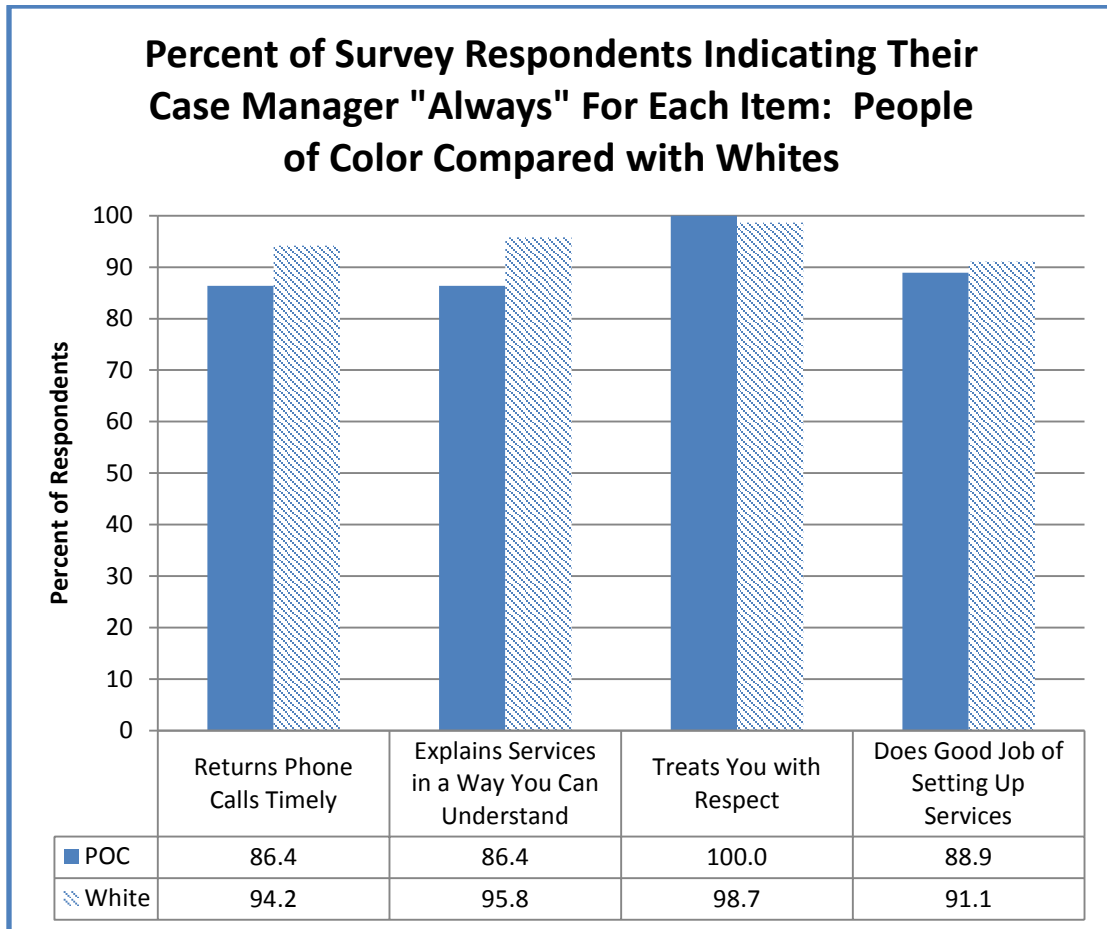
Responses to survey items related to service quality were compared for people of color (those with a racial/ethnic background of Hispanic/Latino, African-American/Black, Asian, Pacific Islander, Native American) and those considered White/Caucasian. As seen in Graph 2, there was some variation between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

People of color were slightly less likely to indicate that their case managers “always” returned their phone calls in a timely manner, explained services in a way they could understand, or did a good job of setting up services for them.

People of color were slightly more likely to indicate their case managers “always” treated them with respect.

None of these variations was statistically significant.

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



N for people of color = 22 for the first three items and 18 for the last. N for Whites = 346 for phone calls, 361 for explaining services, 371 for treating with respect, and 247 for setting up services.

Participation in Service Planning

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

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

Of survey respondents, 93.2% indicated that their case managers “always” involved them in discussing and planning their services and 94.2% indicated they were able to select the services they received.

The results are similar to those from the 2014 survey where 90.7% indicated their case managers “always” involved them in discussing and planning their services and 95.3% indicated they were able to select the services they received.

Survey Question	Percent of Respondents			Resp. (N)
	Always	Sometimes	Never	
Does your case manager involve you in discussing and planning your services? ¹⁷	93.2	5.8	1.1	365

Survey Question	Percent of Respondents		Respondents (N)
	Yes	No	
Are you able to select the services you receive?	94.2	5.8	360

Sample of Comments from Survey Respondents

Make closer contact. Set more goals together and assist as needed.

Although we haven't been a user of services for very long, I do believe that regular (bi-yearly?) review of services needed with the caseworker would be beneficial.

¹⁷ Does not equal 100% due to rounding.

Overall Quality

Overall, survey respondents rated case management services they received quite highly with 70% rating them as Excellent, 19% as Very Good, and 7% as Good.

Just 4% of the survey respondents rated case management services as fair or poor.

Sample of Comments from Survey Respondents

She does very well for me!

She has helped us to feel hopeful and given us peace with the assistance offered.

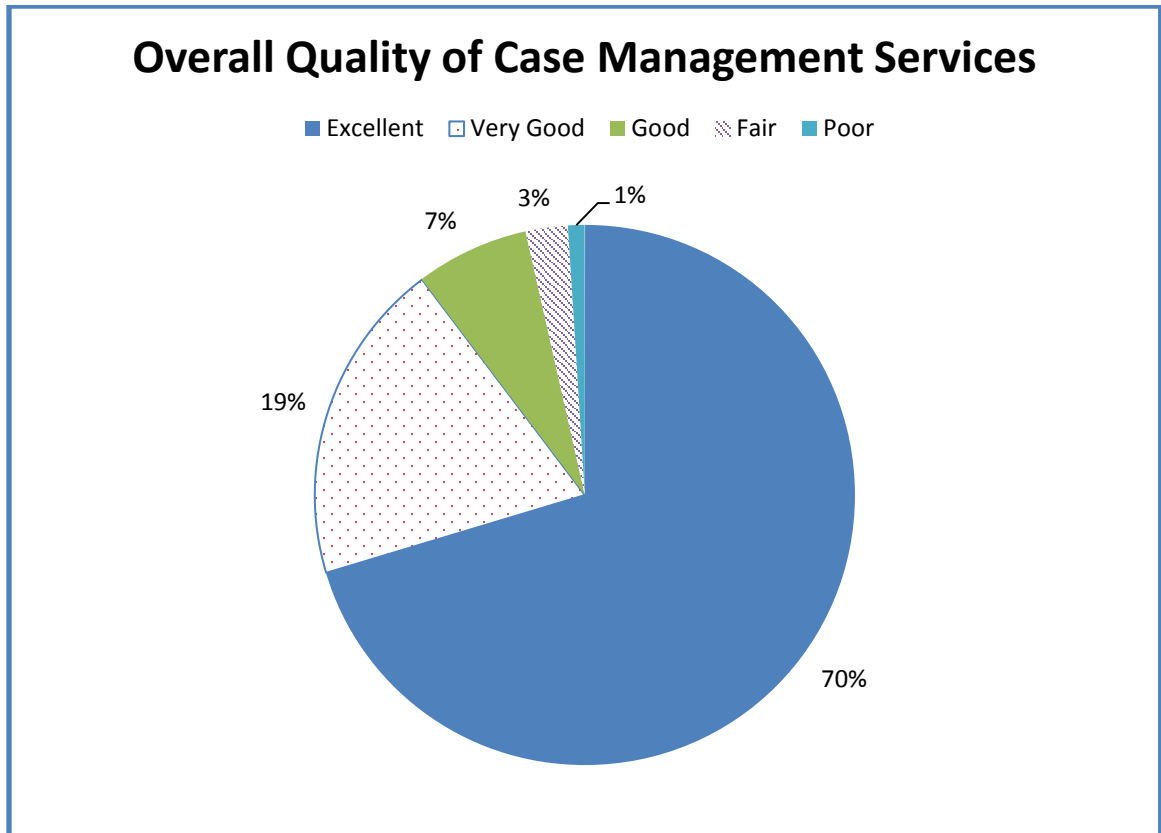
To be fair to the agency, because I have fewer needs I believe I am passed from worker to worker as case managers come and go.

[Case Manager] goes above and beyond her duties. So very helpful.

I would never change my case manager. She is excellent and very caring.

I can't say enough about my case manager that is good enough. I like her very much. She seems very resourceful, knowledgeable, professional yet warm, kind, respectful. I am grateful!

Graph 3: Overall Quality of Case Management Services

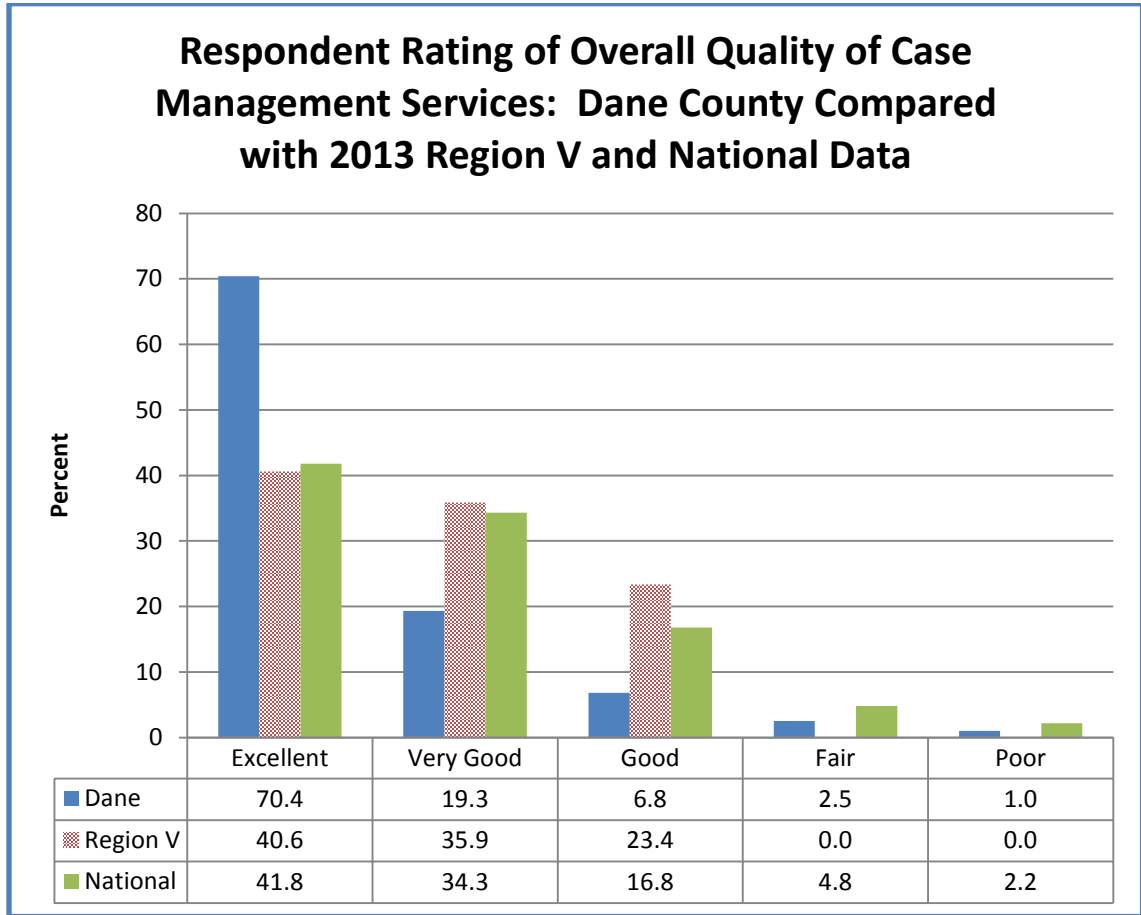


N = 398

Graph 4 provides a comparison of the Dane County survey conducted in 2015 with results of the 2013 National Survey of Older Americans Act Participants survey for Region V - comprised of Illinois, Indiana, Michigan, Minnesota, Ohio, and Wisconsin – and with the national (non-stratified) results. The data is reported by the Administration on Aging via the AGing Integrated Database (AGID); 2013 is the most recent year for which data were compiled at both regional and national levels.

Respondents to the Dane County survey were significantly more likely to rate the overall quality of case management services as “Excellent” than did respondents to the 2013 National Survey at both the Region V and National level.¹⁸

Graph 4: Comparison of Dane County Respondents Rating of Overall Quality of Case Management Services With Respondents from 2013 National Survey of Older Americans Act Participants Survey for Region V and Nationally



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

N = 398 for DCDHS, 64 for Region V, and 495 for National.

¹⁸ $\chi^2 = 86.17429, df=8, p<.05$

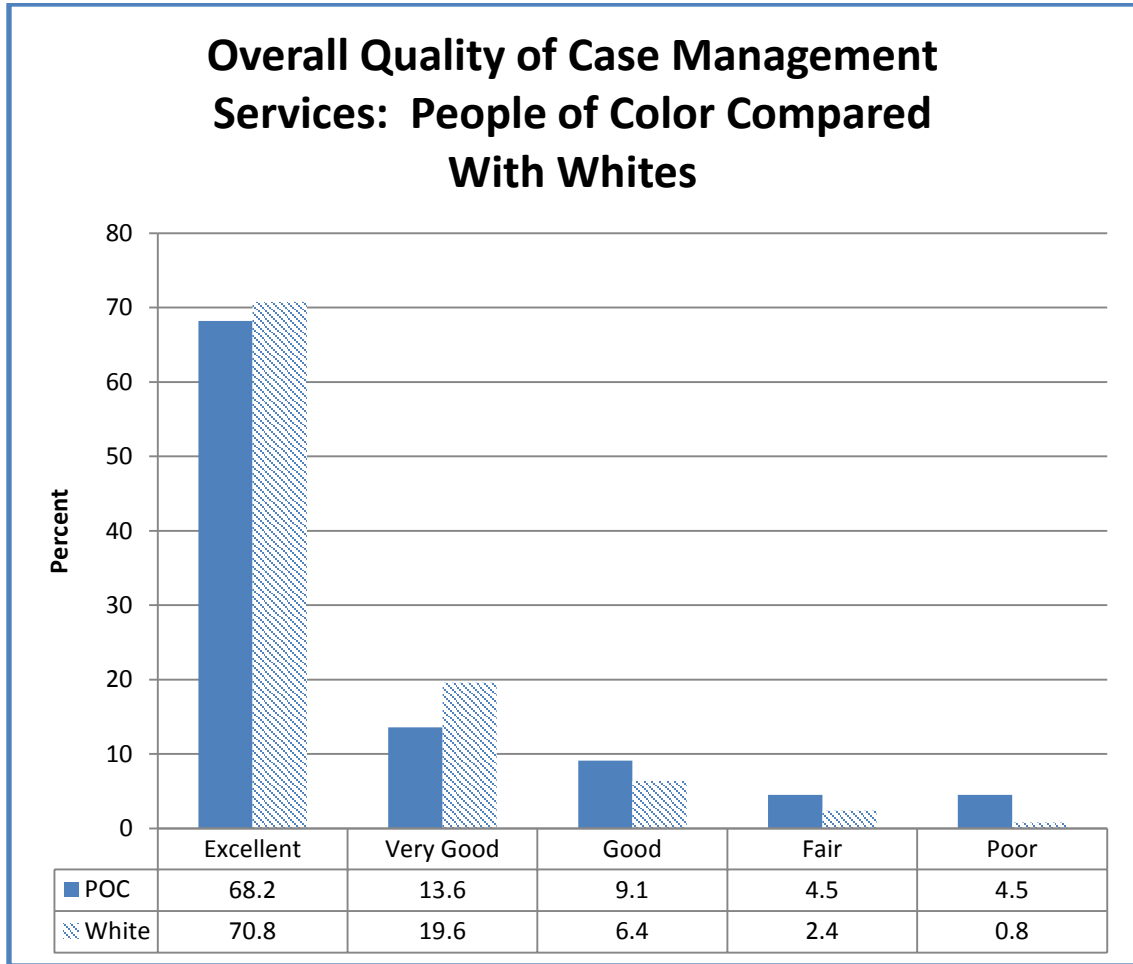
The overall quality of case management services was examined based on gender, race/ethnic status, and length of time case management services had been received.

Among males, 76% rated the case management services as “excellent” compared with females at 68%. However, there was no significant difference between the two groups as to how the overall quality of case management services were rated.¹⁹

There was no statistically significant difference²⁰ in how people of color (those with a racial/ethnic background of Hispanic/ Latino, African-American/Black, Asian, Pacific Islander, Native American) perceived the overall quality of case management services compared with Whites/Caucasians.

There was no statistically significant difference²¹ in terms of overall quality of case management services based on the length of time case management services had been received by survey respondents.

Graph 5: Comparison of Rating of Overall Quality of Case Management Services by People of Color and Whites



N = 22 for people of color and 373 for persons who are White. Overall percent for people of color will not equal 100 due to rounding.

¹⁹ $\chi^2=8.025979, df=4, p<.05.$

²⁰ $\chi^2=3.867396, df=4, p<.05.$

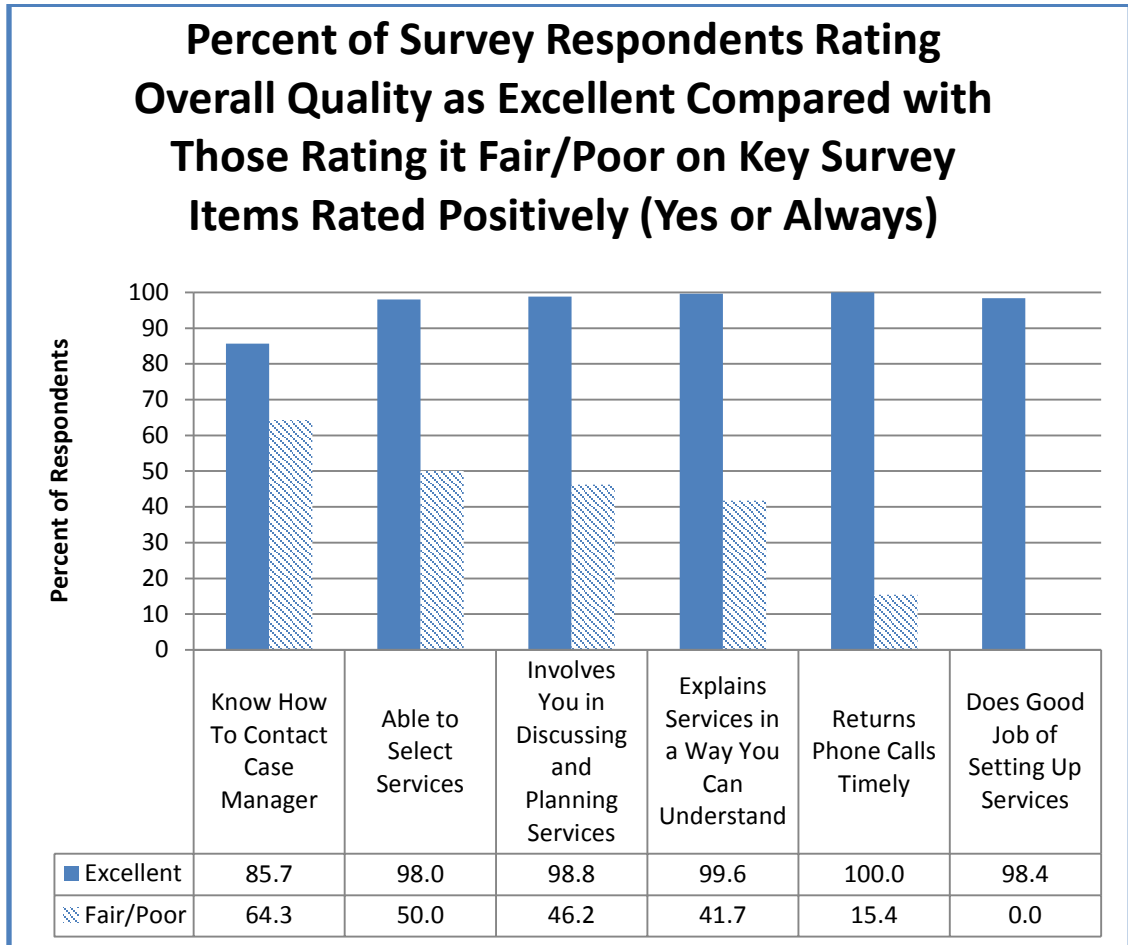
²¹ $\chi^2=25.91402, df=24, p<.05.$

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 managers did a good job of setting up services compared to none of the survey respondents 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 that they knew how to contact their case managers, their case managers returned phone calls in a timely manner, explained services in a way they could understand, involved them in discussing and planning services, and allowed them to select the services they received.

Graph 6: Comparison of Overall Quality Rating With Rating of Key Items



N = 280 for overall quality as “Excellent” and N = 14 for overall quality as Fair or Poor.

While there was no statistically significant difference²² based on length of time case management services had been received for the overall quality of case management services, there were notable differences on a few of the individual survey items.

Survey respondents who received services for 2.5 to 3 years were significantly less likely than other groups to indicate their case manager “Always” returned their phone calls in a timely manner (80%) compared with respondents overall (93.5%).²³

Survey respondents who received case management services for three years or longer were significantly less likely to indicate their case manager involves them in discussing and planning their services.²⁴

Respondents who received case management services between 13 and 18 months were significantly less likely to note their case manager “Always” does a good job of setting up services for them (80.8%) compared with 90.9% of overall respondents.²⁵ This group was also significantly less satisfied (86.8%) than overall survey respondents (96.4%) with the case management services they received.²⁶

Table 7: Percent of Survey Respondents Rating Case Manager as “Always” on Each Item and Percent Indicating “Yes” on Being Satisfied with Case Management Services by Length of Service

Survey Item	Length of Case Management Services as of October 5, 2015						
	6 months or less	7-12 Months	13-18 months	19-24 months	25-30 months	31-36 months	3 + Years
Returns phone call in a timely manner	94.3	94.7	89.7	95.1	94.7	80.0	94.0
Involves you in discussing and planning your services	94.5	94.9	97.1	94.9	95.0	100.0	88.0
Does good job of setting up services for you	87.0	96.4	80.8	92.6	93.8	83.3	92.1
Satisfied with the case management services you receive (Yes)	94.0	96.3	86.8	97.7	95.0	100.0	97.4

²² $\chi^2=25.91402, df=24, p<.05.$

²³ $\chi^2=28.15737, df=12, p<.05.$

²⁴ $\chi^2=48.90117, df=12, p<.05.$

²⁵ $\chi^2=70.28302, df=12, p<.05.$

²⁶ $\chi^2=16.55865, df=6, p<.05.$

Benefits

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

Survey respondents indicated that their case manager helped them get services they did not have before (88%) and that their situation was better because of their case managers' help (95%).

Of the respondents to the survey, 93% 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, 16% 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 8: Benefits of Receiving Case Management Services by Survey Item

Survey Question	Percent of Respondents		
	Yes	No	Respondents (N)
Does your case manager help you get services that you did not have before?	88.0	12.0	367
As a result of receiving the case management services, do you have a better idea of where to get information about other services?	83.6	16.4	385
Is your situation better because of your case manager's help?	94.7	5.3	380
Do the case management services help you continue to live where you choose?	92.5	7.5	348

Sample of Comments from Survey Respondents

Provided me with the necessary info and connections to solve my problem and then checked that it was!

We are very happy with your services and the wonderful attitude of the volunteers providing it.

I wish the agencies would offer other services: help with moving, cooking, organizing, cleaning, etc.; also tax help, homestead, earned tax credits.

She provides me with services my present condition requires and keeps me informed of what I might need in the future.

It is so reassuring to me that I have one person that I know and trust available to answer my questions.

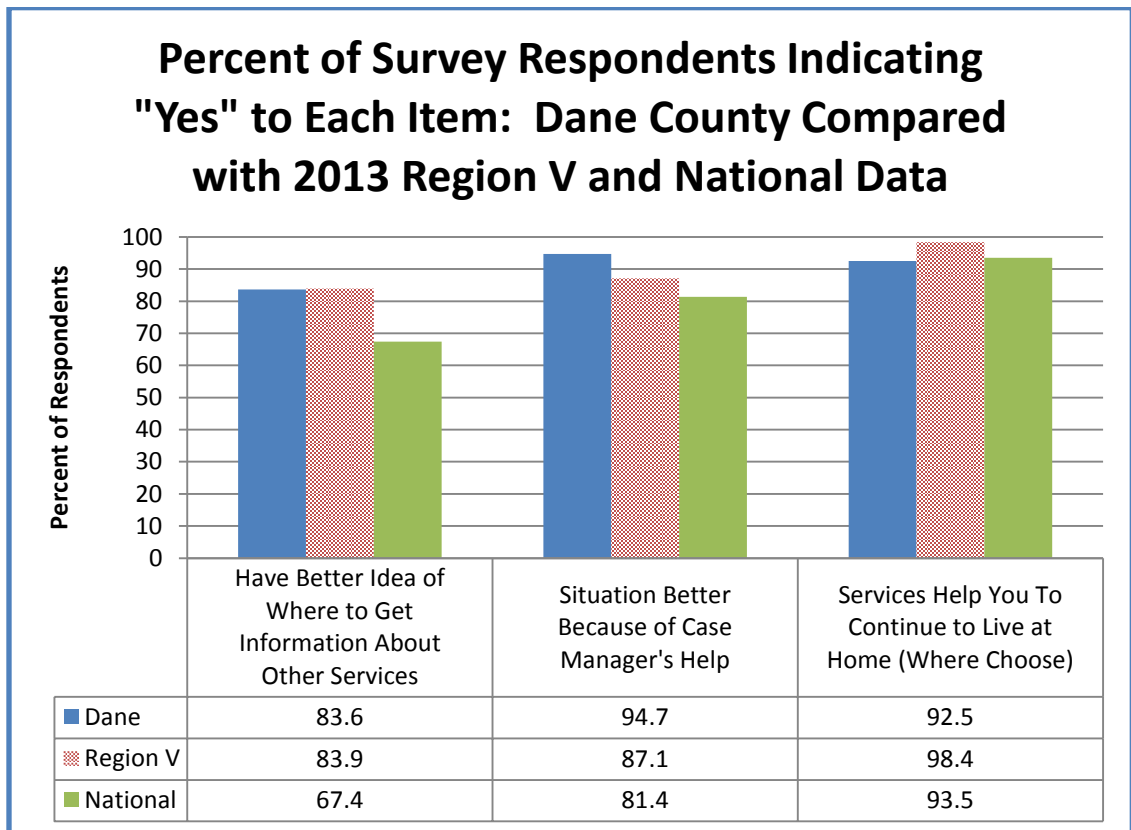
Graph 7 provides a comparison of the Dane County survey conducted in 2015 with results of the 2013 National Survey of Older Americans Act Participants survey results for Region V and with national (non-stratified) results.

Survey respondents from Dane County (83.6%) were similar to Region V respondents (83.9%) in indicating that as a result of the case management services, they have a better idea of where to get information about other services. This is significantly better than the national results of 67.4%.²⁷

Dane County survey respondents were more likely than the 2013 survey respondents to indicate that their situations were better because of their case managers' help (94.7%) compared with respondents in Region V (87.1%) and respondents nationally (81.4%).²⁸

Dane County survey respondents were less likely than 2013 survey respondents to indicate that case management services helped them to continue to live at home or where they chose. However, this difference was not statistically significant.²⁹

Graph 7: Comparison of Dane County Respondents Rating of Benefits of Case Management Services with Respondents from 2013 National Survey of Older Americans Act Participants Survey for Region V and Nationally



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

²⁷ $\chi^2=33.02704$, $df=2$, $p<.05$.

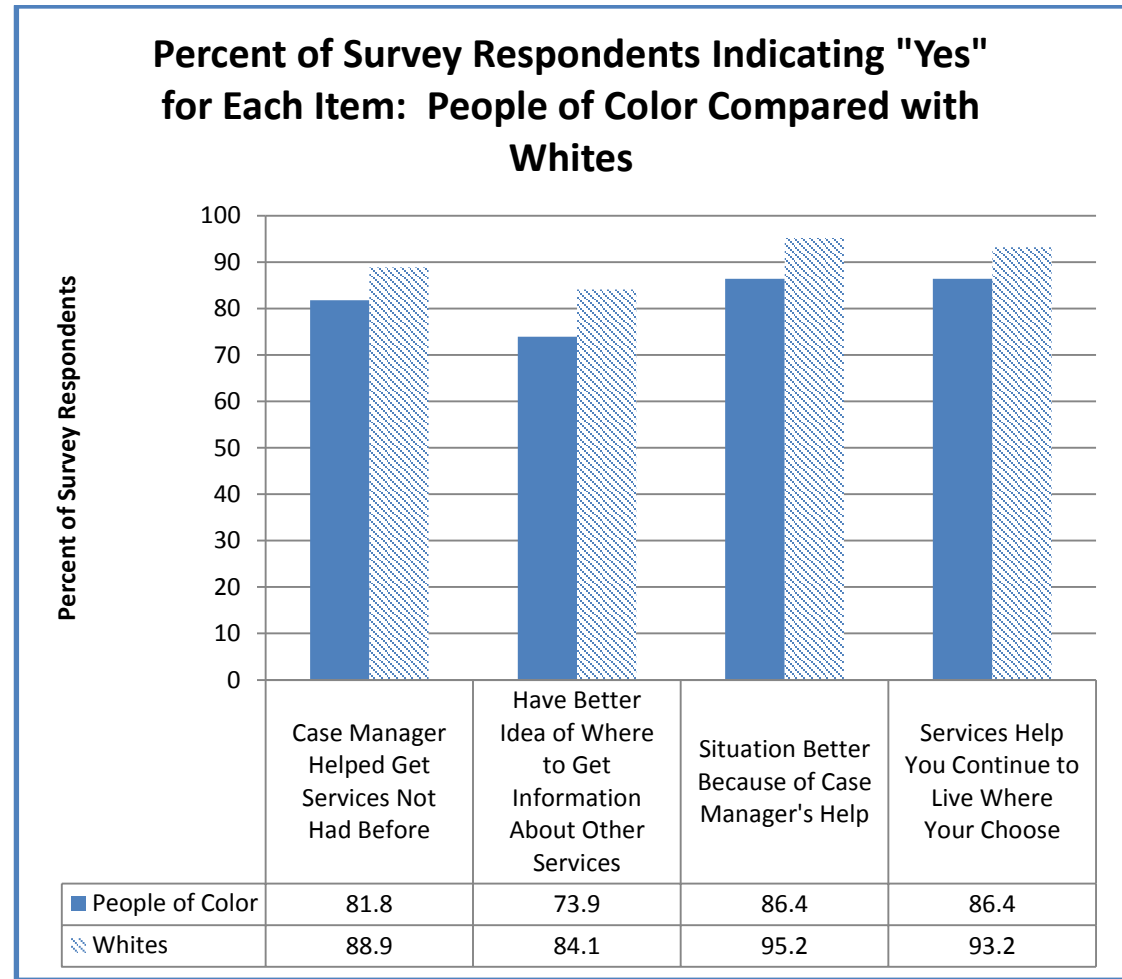
²⁸ Question at the national level was worded slightly different, "Has your situation improved because of the services your case manager arranged."

²⁹ $\chi^2=3.098361$, $df=2$, $p<.05$.

Responses to survey items related to the benefits of case management services were compared for people of color (those with a racial/ethnic background of Hispanic/Latino, African-American/Black, Asian, Pacific Islander, Native American) and persons who were considered White/Caucasian. This is seen in Graph 8.

There were no statistically significant differences between people of color and Whites in indicating their case managers helped them get services they had not had before³⁰, in having a better idea of where to get information about other services³¹, and in indicating their situation was better because of their case managers' help³². There was also no statistical difference between these two populations in indicating that the services helped them to continue to live where they chose.³³

Graph 8: Comparison of Responses to Items Related to Benefits of Case Management Services for People of Color and Whites



N for people of color = 22 for services, 23 for better idea about information, 22 for situation, and 22 for continuing to live at home. N for Whites = 342 for services, 359 for better idea about information, 355 for situation, and 323 for continuing to live at home.

³⁰ $\chi^2=1.012443$, $df=1$, $p<.05$.

³¹ $\chi^2=1.635931$, $df=1$, $p<.05$.

³² $\chi^2=3.228109$, $df=1$, $p<.05$.

³³ $\chi^2=1.427537$, $df=1$, $p<.05$.

Recommendations for Improvement

The survey had a free-form question that asked, "What recommendations do you have for improving case management services?" Of the 209 respondents to this question, 38% (80) indicated that they had no recommendations for improvement and another 33% (70) had praise for the service and/or case manager.

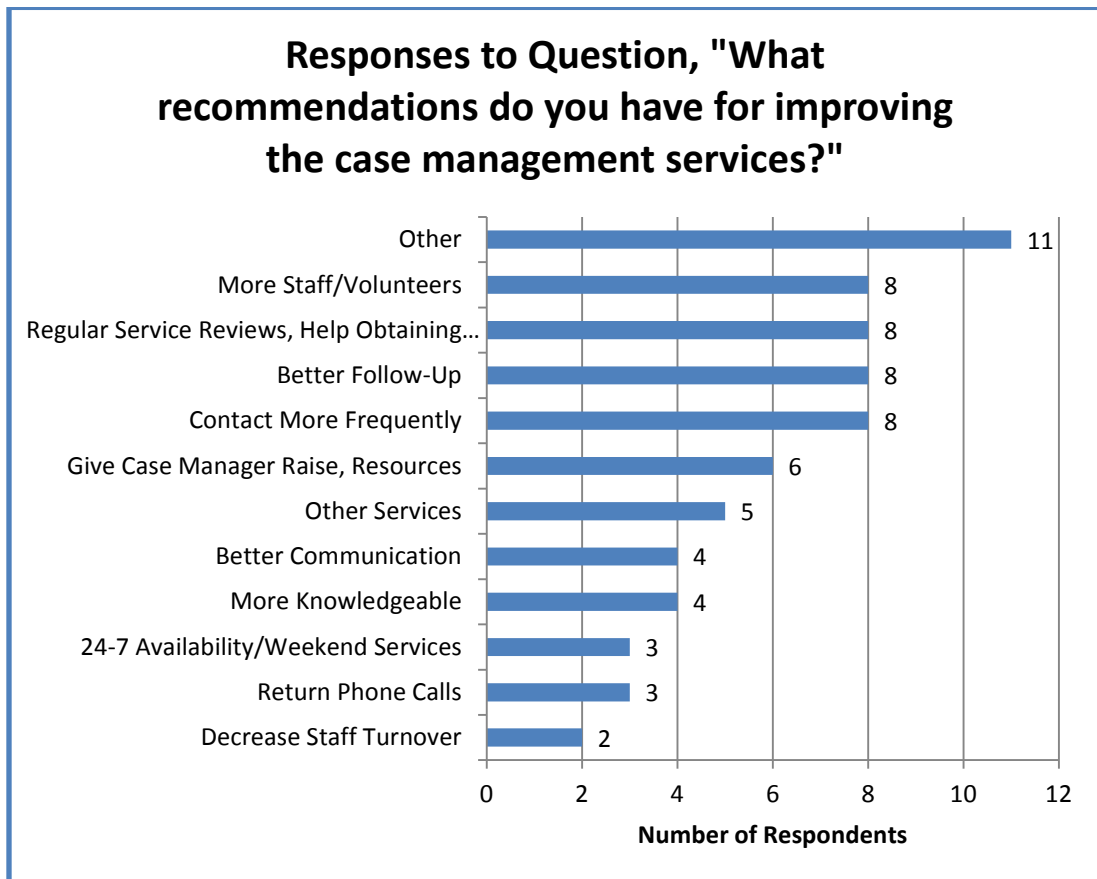
Many of the written comments were praise for the services as seen in the following:

- *If there is a way to improve it, I don't know what it would be. Seems to be perfect now.*
- *[Case Manager] doesn't go 100%, but 150% above and beyond.*
- *She's excellent and takes care of things she thinks I need. She's amazing.*

Responses for the remaining comments were categorized in one or more of 12 categories as seen in Graph 9.

The category of Other included comments that were personal to an individual client, such as needing help with a local phone service or becoming his/her own payee (4); comments on another service (5),

Graph 9: Grouped Responses to Survey Question "What recommendations do you have for improving the case management services?"



having services switched between focal points, better advertising of case management services (1), and the need for private offices for one agency to promote client confidentiality (1) as seen in this comment:

The case managers need individual offices. So much of what is discussed is personal and confidential. They are all jammed together in one space at the Colonial Club and conversations (including telephone calls) can be clearly heard down the hallway.

There was a clustering of comments regarding contacting clients more frequently, returning phone calls promptly, and doing regular services reviews or checking with the client to ascertain if additional services were needed.

Results by Contracted Agency

The following section of the report presents the findings for each contracted agency. 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	Energy Assistance	Food Assistance/ Food Stamps	Home Chore Services	Home-Delivered Meals
Colonial Club Senior Activity Center	51	2.9	9.8	21.6	27.5	19.6	23.5
DeForest Area Community & Senior Center	16	4.4	18.8	50.0	50.0	6.3	0.0
East Madison/Monona Coalition	37	2.6	8.1	24.3	27.0	32.4	29.7
Fitchburg Senior Center	24	4.2	25.0	8.3	20.8	25.0	41.7
McFarland Senior Outreach Services	19	3.5	15.8	57.9	47.4	0.0	26.3
Middleton Senior Center	5	5.4	40.0	40.0	40.0	20.0	20.0
North/Eastside Senior Coalition	11	2.1	9.1	18.2	9.1	54.5	9.1
Northwest Dane Senior Services	18	3.2	16.7	11.1	22.2	11.1	27.8
Oregon Area Senior Center	36	3.2	22.2	5.6	16.7	5.6	44.4
South Madison Coalition of the Elderly (SMCE)	19	3.0	5.3	15.8	42.1	31.6	5.3
Southwest Dane Senior Outreach	16	4.4	18.8	37.5	18.8	31.3	43.8
Stoughton Area Senior Center	34	3.8	8.8	35.3	41.2	20.6	29.4
Sugar River Senior Center	9	3.0	11.1	22.2	22.2	22.2	55.6
Wausaukee Senior Center	60	3.4	6.7	30.0	26.7	8.3	51.7
West Madison Senior Coalition (WMSC)	47	2.6	10.6	14.9	27.7	25.5	27.7

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.					
		Homemaker/ Housekeeper	Housing Assistance	Information and Assistance	Legal Assistance	Medicare/ Medicaid/ Medicare Part D (Drug)	Medical Equipment
Colonial Club Senior Activity Center	51	11.8	3.9	51.0	15.7	49.0	5.9
DeForest Area Community & Senior Center	16	6.3	12.5	87.5	31.3	43.8	56.3
East Madison/Monona Coalition (EMMCA)	37	8.1	2.7	43.2	10.8	32.4	13.5
Fitchburg Senior Center	24	25.0	25.0	50.0	33.3	29.2	45.8
McFarland Senior Outreach Services	19		10.5	63.2	15.8	42.1	31.6
Middleton Senior Center	5	20.0	60.0	100.0	20.0	60.0	40.0
North/Eastside Senior Coalition (NESCO)	11	0.0	27.3	36.4	0.0	27.3	0.0
Northwest Dane Senior Services	18	5.6	0.0	50.0	11.1	66.7	27.8
Oregon Area Senior Center	36	11.1	11.1	55.6	19.4	19.4	36.1
South Madison Coalition of the Elderly (SMCE)	19	15.8	15.8	42.1	10.5	21.1	10.5
Southwest Dane Senior Outreach	16	18.8	6.3	62.5	12.5	18.8	50.0
Stoughton Area Senior Center	34	23.5	17.6	55.9	14.7	44.1	32.4
Sugar River Senior Center	9	28.6	11.1	44.4	11.1	33.3	22.2
Waunakee Senior Center	60	13.3	8.3	63.3	20.0	35.0	26.7
West Madison Senior Coalition (WMSC)	47	12.8	8.5	42.6	21.3	23.4	10.6

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.			
		Medication Management	Personal Care Services	Transportation	Other
Colonial Club Senior Activity Center	51	9.8	9.8	17.6	11.8
DeForest Area Community & Senior Center	16	18.8	25.0	25.0	12.5
East Madison/Monona Coalition (EMMCA)	37	2.7	8.1	8.1	8.1
Fitchburg Senior Center	24	8.3	12.5	58.3	8.3
McFarland Senior Outreach Services	19	0.0	21.1	15.8	5.3
Middleton Senior Center	5	20.0	20.0	40.0	0.0
North/Eastside Senior Coalition (NESCO)	11	0.0	9.1	9.1	0.0
Northwest Dane Senior Services	18	11.1	11.1	27.8	16.7
Oregon Area Senior Center	36	16.7	16.7	33.3	5.6
South Madison Coalition of the Elderly (SMCE)	19	15.8	10.5	42.1	15.8
Southwest Dane Senior Outreach	16	12.5	31.3	62.5	12.5
Stoughton Area Senior Center	34	8.8	8.8	26.5	14.7
Sugar River Senior Center	9	11.1	0.0	11.1	0.0
Waunakee Senior Center	60	1.7	10.0	35.0	6.7
West Madison Senior Coalition (WMSC)	47	0.0	14.9	8.5	6.4

Agency	Q2. Do you know how to contact your case manager when you need to?			Q3. Does your case manager return your phone calls in a timely manner?			
	Yes	No	Respondents	Always	Sometimes	Never	Respond.
Overall	97.2	4.7	355	93.5	6.2	0.3	371
Colonial Club Senior Activity Center	97.9	2.1	48	87.0	13.0	0.0	46
DeForest Area Community & Senior Center	100.0	0.0	14	100.0	0.0	0.0	15
East Madison/Monona Coalition (EMMCA)	91.7	5.7	35	85.3	14.7	0.0	34
Fitchburg Senior Center	95.2	4.8	21	95.5	4.5	0.0	22
McFarland Senior Outreach Services	100.0	0.0	16	100.0	0.0	0.0	20
Middleton Senior Center	100.0	0.0	4	100.0	0.0	0.0	6
North/Eastside Senior Coalition (NESCO)	100.0	0.0	10	81.8	18.2	0.0	11
Northwest Dane Senior Services	100.0	0.0	13	100.0	0.0	0.0	14
Oregon Area Senior Center	97.2	2.8	36	97.1	2.9	0.0	34
South Madison Coalition of the Elderly (SMCE)	88.9	11.1	18	83.3	16.7	5.6	18
Southwest Dane Senior Outreach	100.0	0.0	14	100.0	0.0	0.0	15
Stoughton Area Senior Center	100.0	0.0	29	100.0	0.0	0.0	30
Sugar River Senior Center	100.0	0.0	4	100.0	0.0	0.0	8
Waukeke Senior Center	98.0	2.0	50	98.2	1.8	0.0	57
West Madison Senior Coalition (WMSC)	95.3	4.7	43	90.0	10.0	0.0	40

Agency	Q4. Does your case manager explain your services in a way you can understand?					Q5. Does your case manager treat you with respect?			
	Always	Sometimes	Never	Respond.		Always	Sometimes	Never	Respond.
Overall	95.3	4.7	0.0	386		98.7	1.0	0.3	396
Colonial Club Senior Activity Center	89.6	10.4	0.0	48		98.0	2.0	0.0	50
DeForest Area Community & Senior Center	100.0	0.0	0.0	16		100.0	0.0	0.0	16
East Madison/Monona Coalition (EMMCA)	94.3	5.7	0.0	35		97.2	2.8	0.0	36
Fitchburg Senior Center	95.5	4.5	0.0	22		100.0	0.0	0.0	25
McFarland Senior Outreach Services	100.0	0.0	0.0	20		100.0	0.0	0.0	20
Middleton Senior Center	100.0	0.0	0.0	6		100.0	0.0	0.0	6
North/Eastside Senior Coalition (NESCO)	90.9	9.1	0.0	11		100.0	0.0	0.0	11
Northwest Dane Senior Services	100.0	0.0	0.0	18		100.0	0.0	0.0	18
Oregon Area Senior Center	97.1	2.9	0.0	38		97.3	2.7	0.0	37
South Madison Coalition of the Elderly (SMCE)	83.3	16.7	0.0	18		94.7	0.0	5.3	19
Southwest Dane Senior Outreach	100.0	0.0	0.0	15		100.0	0.0	0.0	15
Stoughton Area Senior Center	100.0	0.0	0.0	32		100.0	0.0	0.0	33
Sugar River Senior Center	100.0	0.0	0.0	9		100.0	0.0	0.0	9
Waukegan Senior Center	96.6	3.4	0.0	58		100.0	0.0	0.0	57
West Madison Senior Coalition (WMSC)	93.2	6.8	0.0	44		97.7	2.3	0.0	44

Agency	Q6. Does your case manager involve you in discussing and planning your services?					Q7. Does your case manager do a good job setting up services (transportation, meals, medical appointments, etc.) for you?			
	Always	Sometimes	Never	Respond.		Always	Sometimes	Never	Respond.
Overall	93.2	5.8	1.1	365		90.9	7.5	1.5	265
Colonial Club Senior Activity Center	93.5	4.3	2.2	46		84.6	15.4	0.0	26
DeForest Area Community & Senior Center	100.0	0.0	0.0	16		90.9	9.1	0.0	11
East Madison/Monona Coalition (EMMCA)	90.9	9.1	0.0	33		90.0	10.0	0.0	20
Fitchburg Senior Center	95.2	4.8	0.0	21		100.0	0.0	0.0	19
McFarland Senior Outreach Services	100.0	0.0	0.0	19		92.9	7.1	0.0	14
Middleton Senior Center	100.0	0.0	0.0	5		100.0	0.0	0.0	2
North/Eastside Senior Coalition (NESCO)	80.0	20.0	0.0	10		75.0	25.0	0.0	8
Northwest Dane Senior Services	100.0	0.0	0.0	16		100.0	0.0	0.0	12
Oregon Area Senior Center	93.8	6.3	0.0	32		96.0	4.0	0.0	25
South Madison Coalition of the Elderly (SMCE)	78.9	10.5	10.5	19		53.8	23.1	23.1	13
Southwest Dane Senior Outreach	84.6	7.7	7.7	15		84.6	15.4	0.0	13
Stoughton Area Senior Center	96.8	3.2	0.0	31		100.0	0.0	0.0	26
Sugar River Senior Center	100.0	0.0	0.0	9		100.0	0.0	0.0	9
Waukegan Senior Center	94.4	5.6	0.0	54		94.7	5.3	0.0	38
West Madison Senior Coalition (WMSC)	90.2	9.8	0.0	41		89.7	6.9	3.4	29

Agency	Q8. Does your case manager help you get services that you did not have before?					Q9. Are you able to select the services you receive?			
	Yes	No	Other Response	Respond.		Yes	No	Other Response	Respond.
Overall	88.0	12.0	0.0	367		94.2	5.8	0.0	360
Colonial Club Senior Activity Center	95.5	4.5	0.0	44		97.7	2.3	0.0	43
DeForest Area Community & Senior Center	100.0	0.0	0.0	14		92.9	7.1	0.0	14
East Madison/Monona Coalition (EMMCA)	77.8	22.2	0.0	36		91.7	8.3	0.0	36
Fitchburg Senior Center	87.0	13.0	0.0	23		95.5	4.5	0.0	22
McFarland Senior Outreach Services	83.3	16.7	0.0	18		88.9	11.1	0.0	18
Middleton Senior Center	100.0	0.0	0.0	5		100.0	0.0	0.0	4
North/Eastside Senior Coalition (NESCO)	45.5	54.5	0.0	11		80.0	20.0	0.0	10
Northwest Dane Senior Services	100.0	0.0	0.0	14		100.0	0.0	0.0	16
Oregon Area Senior Center	91.7	8.3	0.0	36		100.0	0.0	0.0	35
South Madison Coalition of the Elderly (SMCE)	76.5	23.5	0.0	17		68.8	31.3	0.0	16
Southwest Dane Senior Outreach	100.0	0.0	0.0	16		100.0	0.0	0.0	16
Stoughton Area Senior Center	96.6	3.4	0.0	29		100.0	0.0	0.0	28
Sugar River Senior Center	100.0	0.0	0.0	8		100.0	0.0	0.0	9
Waunakee Senior Center	92.3	7.7	0.0	52		98.1	1.9	0.0	52
West Madison Senior Coalition (WMSC)	77.3	22.7	0.0	44		87.8	12.2	0.0	41

Agency	Q10. As a result of receiving the case management services, do you have a better idea of where to get information about other services?					Q11. Is your situation better because of your case manager's help?			
	Yes	No	Other Response	Respond.		Yes	No	Other Response	Respond.
Overall	83.6	16.4	0.0	385		94.7	5.3	0.0	380
Colonial Club Senior Activity Center	89.8	10.2	0.0	49		93.0	7.0	0.0	43
DeForest Area Community & Senior Center	93.3	6.7	0.0	15		100.0	0.0	0.0	15
East Madison/Monona Coalition (EMMCA)	81.1	18.9	0.0	37		85.7	14.3	0.0	35
Fitchburg Senior Center	82.6	17.4	0.0	23		96.0	4.0	0.0	25
McFarland Senior Outreach Services	85.0	15.0	0.0	20		100.0	0.0	0.0	20
Middleton Senior Center	75.0	25.0	0.0	4		100.0	0.0	0.0	4
North/Eastside Senior Coalition (NESCO)	63.6	36.4	0.0	11		66.7	33.3	0.0	12
Northwest Dane Senior Services	88.2	11.8	0.0	17		100.0	0.0	0.0	17
Oregon Area Senior Center	85.7	14.3	0.0	35		100.0	0.0	0.0	35
South Madison Coalition of the Elderly (SMCE)	72.2	27.8	0.0	18		84.2	15.8	0.0	19
Southwest Dane Senior Outreach	93.8	6.3	0.0	16		100.0	0.0	0.0	16
Stoughton Area Senior Center	76.7	23.3	0.0	30		100.0	0.0	0.0	32
Sugar River Senior Center	100.0	0.0	0.0	8		100.0	0.0	0.0	8
Waunakee Senior Center	84.5	15.5	0.0	58		100.0	0.0	0.0	56
West Madison Senior Coalition (WMSC)	79.5	20.5	0.0	44		90.7	9.3	0.0	43

Agency	Q12. What recommendations do you have for improving the case management services? (Free-form narrative classified into categories of responses.)						
	Total Number of Recommendations	Give Case Manager Raise, Resources	Regular Service Reviews, Help with Obtaining Other Services	Hire Additional Staff, Add Volunteers	More Frequent Contact, More Time	Better Follow-Up	Better Communication
Colonial Club Senior Activity Center	13	1	1	1	1	2	
DeForest Area Community & Senior Center	1	1					
East Madison/Monona Coalition (EMMCA)	9		2	1		1	
Fitchburg Senior Center	4	1	1	1	1		
McFarland Senior Outreach Services	1						
Middleton Senior Center	0						
North/Eastside Senior Coalition (NESCO)	5				1	1	1
Northwest Dane Senior Services	0						
Oregon Area Senior Center	5	1			1		1
South Madison Coalition of the Elderly (SMCE)	6					1	1
Southwest Dane Senior Outreach	3	1	1		1		
Stoughton Area Senior Center	0						
Sugar River Senior Center	1						
Waunakee Senior Center	9	1	2	1	1		1
West Madison Senior Coalition (WMSC)	10		1	4	2		

Agency	Q12. What recommendations do you have for improving the case management services? (Free-form narrative classified into categories of responses.)					
	Decrease Turnover	More knowledgeable	Be Open Weekends or Have Services/ Contact Available 24/7	Return Phone Calls	Expand Services, More Affordable Services, Lessen Restrictions to Obtaining Services	Other
Colonial Club Senior Activity Center			2	1	2	2
DeForest Area Community & Senior Center						
East Madison/Monona Coalition (EMMCA)	2				1	2
Fitchburg Senior Center						
McFarland Senior Outreach Services						1
Middleton Senior Center						
North/Eastside Senior Coalition (NESCO)				1		1
Northwest Dane Senior Services						
Oregon Area Senior Center		1				1
South Madison Coalition of the Elderly (SMCE)		1	1	1		1
Southwest Dane Senior Outreach						
Stoughton Area Senior Center						
Sugar River Senior Center						1
Waunakee Senior Center					1	2
West Madison Senior Coalition (WMSC)		2			1	

Agency	Q13. Are you satisfied with the case management services you receive?					Q14. Do the case management services help you continue to live where you choose?			
	Yes	No	Other Response	Respond.		Yes	No	Other Response	Respond.
Overall	96.4	4.6	0.0	392		92.5	7.5	0.0	348
Colonial Club Senior Activity Center	93.5	6.5	0.0	46		95.3	4.7	0.0	43
DeForest Area Community & Senior Center	100.0	0.0	0.0	16		92.3	7.7	0.0	13
East Madison/Monona Coalition (EMMCA)	94.4	5.6	0.0	36		83.9	16.1	0.0	31
Fitchburg Senior Center	100.0	0.0	0.0	22		100.0	0.0	0.0	17
McFarland Senior Outreach Services	100.0	0.0	0.0	18		93.8	6.3	0.0	16
Middleton Senior Center	100.0	0.0	0.0	6		100.0	0.0	0.0	5
North/Eastside Senior Coalition (NESCO)	81.8	18.2	0.0	11		90.0	10.0	0.0	10
Northwest Dane Senior Services	100.0	0.0	0.0	17		100.0	0.0	0.0	13
Oregon Area Senior Center	100.0	0.0	0.0	38		93.3	6.7	0.0	30
South Madison Coalition of the Elderly (SMCE)	63.2	36.8	0.0	19		64.7	35.3	0.0	17
Southwest Dane Senior Outreach	100.0	0.0	0.0	15		100.0	0.0	0.0	16
Stoughton Area Senior Center	100.0	0.0	0.0	33		96.9	3.1	0.0	32
Sugar River Senior Center	100.0	0.0	0.0	9		100.0	0.0	0.0	8
Waunakee Senior Center	100.0	0.0	0.0	60		94.6	5.4	0.0	56
West Madison Senior Coalition (WMSC)	91.3	8.7	0.0	46		90.2	9.8	0.0	41

Agency	Q.15 How would you rate the overall quality of the case management services you have received? Would you say....						
	Excellent	Very Good	Good	Fair	Poor	Other	Respond.
Overall	70.4	19.3	6.8	2.5	0.1	0.0	399
Colonial Club Senior Activity Center	68.0	16.0	0.8	0.6	0.2	0.0	50
DeForest Area Community & Senior Center	87.5	6.3	6.3	0.0	0.0	0.0	16
East Madison/Monona Coalition (EMMCA)	50.0	33.3	11.1	2.8	2.8	0.0	36
Fitchburg Senior Center	78.3	13.0	8.7	0.0	0.0	0.0	23
McFarland Senior Outreach Services	61.1	38.9	0.0	0.0	0.0	0.0	18
Middleton Senior Center	50.0	50.0	0.0	0.0	0.0	0.0	6
North/Eastside Senior Coalition (NESCO)	45.5	18.2	36.4	0.0	0.0	0.0	11
Northwest Dane Senior Services	52.9	47.1	0.0	0.0	0.0	0.0	17
Oregon Area Senior Center	81.1	18.9	0.0	0.0	0.0	0.0	37
South Madison Coalition of the Elderly (SMCE)	57.9	5.3	10.5	15.8	10.5	0.0	19
Southwest Dane Senior Outreach	75.0	18.8	6.3	0.0	0.0	0.0	16
Stoughton Area Senior Center	88.2	5.9	5.9	0.0	0.0	0.0	34
Sugar River Senior Center	77.8	11.1	11.1	0.0	0.0	0.0	9
Waunakee Senior Center	80.3	16.4	3.3	0.0	0.0	0.0	61
West Madison Senior Coalition (WMSC)	65.2	19.6	8.7	6.5	0.0	0.0	46

Appendix A: Survey Instrument



Case Management Survey

Introduction: We need your help! Dane County Department of Human Services is always interested in improving the services we help to fund. We would like to know what you think about the case management services you have received in 2015 from the **«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 **Friday, October 30, 2015**.

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

		YES	
a.	Adult Day Services	<input type="checkbox"/>	1
b.	Energy Assistance	<input type="checkbox"/>	1
c.	Food Assistance/Food Stamps/SNAP	<input type="checkbox"/>	1
d.	Home Chore Services	<input type="checkbox"/>	1
e.	Home-Delivered Meals	<input type="checkbox"/>	1
f.	Homemaker / Housekeeper	<input type="checkbox"/>	1
g.	Housing Assistance	<input type="checkbox"/>	1
h.	Information and Assistance	<input type="checkbox"/>	1
i.	Legal Assistance	<input type="checkbox"/>	1
j.	Medicare / Medicaid / Medicare Part D (Drug)	<input type="checkbox"/>	1
k.	Medical Equipment (wheelchair, walker, etc.)	<input type="checkbox"/>	1
l.	Medication Management	<input type="checkbox"/>	1
m.	Personal Care Services.	<input type="checkbox"/>	1
n.	Transportation	<input type="checkbox"/>	1
o.	Other	<input type="checkbox"/>	1
List: _____			

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

		Always	Some- times	Never	Does Not Apply
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	<input type="checkbox"/> 4
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	<input type="checkbox"/> 4
5.	Does your case manager treat you with respect?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
6.	Does your case manager involve you in discussing and planning your services?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
7.	Does your case manager do a good job setting up services (transportation, meals, medical appointments, etc.) for you?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

8. Does your case manager help you get services that you did not have before?
 Yes..... 1
 No..... 2

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

10. 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

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

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

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

Yes..... 1

No..... 2

14. Do the case management services help you continue to live where you choose?

Yes..... 1

No..... 2

15. 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

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

17. 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/4th FL
Madison, WI 53704

Survey No. «Client_No»

