

City of Burlington / 2013 CDBG Application Form

Project Name: Options Counseling/Case Management for Seniors

Project Location / Address: Burlington

Applicant Organization / Agency: CVAA – Champlain Valley Area Agency on Aging

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EIN #: 22-2474636 DUNS #: 034409102

CDBG Funding Request: \$15,000

1. Type of Organization

Local Government

For-Profit Organization

Faith-Based Organization

Non-Profit Organization (please provide copy of your
IRS 501(c)(3) tax exemption letter)

Institution of Higher Education

2. Conflict of Interest: Please complete and sign attached form.

3. List of Board of Directors: Please attach.

Certification

To the best of my knowledge and belief, data in this proposal are true and correct.

I have been duly authorized to apply for this funding on behalf of this agency.

I understand that this grant funding is conditioned upon compliance with federal CDBG regulations.

I further certify that no contracts have been awarded, funds committed or construction begun on the proposed program, and that none will be prior to issuance of a Release of Funds by the Program Administrator.

Signature of Authorized Official

Name of Authorized Official

Title

Date

I. Demonstrated Need

1. Project Narrative: Provide a description of the project/program to be funded with CDBG. (Refer to NOFA for required information in this section.)

Case Management for seniors will fulfill CVAA's mission to help people remain independent with dignity in their setting of choice. There is a growing senior population and many of the seniors aging in place have limited incomes and resources. The cost of living has increased while their resources are depleted and their retirement incomes have remained the same or have included minimal increases in the past few years. When seniors call or are referred to CVAA they receive an assessment from Senior HelpLine specialists to determine their needs for assistance and are referred for Options Counseling. The Options Counselor/Case Manager works with the senior or the caregiver to help them identify goals, explain options, provide decision support and implement an action/service plan. Once the services/benefits are obtained the individual or couple will continue to receive case management, if needed, which will include monitoring of the services, addressing complex on-going needs and referrals for additional services. With permission of the client, the case manager will work with other service providers, physicians, community teams and family members on the client's behalf to assure that the services they receive are meeting their needs and expectations.

2. Innovation

a. What new programs and/or services will be provided as a result of CDBG assistance?

Options Counseling as described in the narrative is a new service that is currently being implemented within the case management program. Always a part of the role of the case manager, Options Counseling nationally is being recognized by the Administration on Community Living (ACL), formerly the Administration on Aging, as a critical service for seniors and caregivers. The focus over the past few years has been on developing Options Counseling standards and certification criteria. Area Agencies on Aging are community partners with the Vermont Center for Independent Living, Vermont Brain Injury Association and VT 211 as part of the Aging and Disabilities Resource Community (ADRC). The Vermont ADRC provides access to long term services and information to seniors and the disability community. The ADRC member agencies have developed statewide Options Counseling standards and policies that are compatible with the national standards. CVAA is implementing these standards and new protocols for responding to requests for services from seniors and their families and caregivers.

Also, CVAA has received a grant to implement an outreach program for seniors who are refugees and their families. The majority of refugees are located in Burlington and surrounding towns. CVAA will be able to hire an outreach worker who is him/herself a member of the refugee community to work with seniors in the Bhutanese/Nepali, Sudanese, Vietnamese and other ethnic communities. The Burlington case managers will have the opportunity to receive training that will better enable them to serve these communities.

The CDBG funds will provide support, including training and implementation of these programs for our Burlington case managers to help us better serve the Burlington senior population.

b. How will existing programs and/or services be expanded as a result of CDBG assistance? Use actual numbers to demonstrate expansion.

Our goal in requesting CDBG assistance is to be able to better manage our existing programs and services which are strained by the high numbers of referrals and complexity of client needs. Over the past year we have been exploring ways to continue to serve the numbers of seniors needing our services without creating waiting lists or refusing to serve people with needs that do not meet priorities. We have made some changes by referring some activities to Food Stamp Outreach staff and handling some referrals through the Senior HelpLine, rather than through the case management program. The recent decision to close the PACE site in Colchester will have an effect on the caseloads of our case managers, including the Burlington staff as we try to absorb the clients who will no longer be served through the PACE program. We hope, through the implementation of Options Counseling, to serve seniors who do not need the ongoing services of a case manager by providing them with the information and decision making support they need to meet their needs. The CDBG funds will help us to implement Options Counseling as a service for Burlington seniors and their caregivers; continue to provide case management to the Burlington seniors that need ongoing monitoring and assessment; and provide training to support both services.

c. Are there other programs in the community that address similar issues? ___ Yes ___✓___ No
If Yes, how is this proposal different?

There are other programs that serve seniors, but not in the same capacity. Those programs are generally the service providers with whom we coordinate services and to whom we refer our clients if they decide to pursue services. We receive referrals from these organizations to provide case management and options counseling.

II. Proposed Outcomes

1. How will this project/program impact individuals and contribute to the City’s anti-poverty strategy?

The majority of seniors that we serve have very low to moderate incomes and have a difficult time affording their monthly housing, utility, heat and food costs. Many of the seniors that we see and for whom we receive referrals have long term care needs and have chosen to remain in their homes rather than move to nursing and residential care homes. CVAA identifies seniors who would qualify for public benefits that can help them meet their monthly living expenses and helps them to apply for the benefits and programs that can help with these costs. Our case management staff also helps individuals to identify in-home care needs and coordinates these services so that individuals with health and safety issues can remain in their own homes. We are not able to prevent poverty but we are able to help those individuals whose incomes put them at or near the poverty level to access benefits and services to prevent them from becoming homeless or losing their homes. Our ability to effectively help these individuals depends on the benefits and services available as well as the willingness of the individual being served to actively participate in their own plan of action.

2. List your goals/objectives, activities to implement and expected outcomes (# of units, # of individuals, etc.)

CVAA serves 4 counties (Addison, Franklin, Grand Isle and Chittenden) and the case management program served 2668 seniors in the past year. Eighteen percent of those served were Burlington seniors. We have 4 case managers who work with seniors in Burlington. In the past year 478 seniors were served by Burlington case managers. One of these case managers works only with Burlington seniors. This case manager worked with 136 seniors in the past year. Our goal is to receive 50 new referrals for Options Counseling and to continue to provide case management services to at least 140 seniors.

Goal/Objective	Activity Funded	Outcomes
Assist low income seniors to be able to meet their monthly living expenses	Case Management for seniors – 1 full time case manager	140 Burlington seniors receive case management services from one Burlington Case Manager 50 seniors assisted with public benefit applications, issues, appeals Annual survey results demonstrate that the assistance from CVAA helped the individual to meet monthly expenses.
Assist seniors to receive the services they need in order to remain in their setting of choice		55 Burlington seniors receive long term care services through Choices for Care 8 referrals to Eldercare Mental Health clinician 8 Self Neglecting individuals served 4 Homeless individuals served Annual survey results demonstrates that the services received helped the individual to remain at home
Burlington seniors identify their needs and understand their options for benefits and services		50 new referrals for Options Counseling 90% satisfaction with Options Counseling services

III. Experience / Organizational Capacity

1. What is your agency’s mission, and how do the proposed activities fit with your mission?

CVAA’s mission is to help seniors age with independence and dignity by providing information, services, education, support and advocacy to seniors and caregivers. We serve all individuals 60 years of age and older, regardless of income, who request our assistance.

2. How long has your agency been in operation?

CVAA has been in existence since 1974 and has been serving seniors for the past 37 years.

3. What programs and services do you offer?

CVAA employs 18 full time case managers serving the four counties of Addison, Franklin, Grand Isle and Chittenden. Nine case managers and one options counselor/case manager serve Chittenden County and three case managers spend all, or part of their time covering Burlington alone. In the past year our case management program provided assistance to 2668 seniors, 18% of the seniors lived in Burlington, a total of 478 Burlington seniors.

Aside from Case Management and Options Counseling services CVAA offers a number of other programs and services to seniors. The Senior HelpLine is a toll-free, nationally certified call center for seniors, caregivers, health professionals, family members or anyone concerned about seniors to call for information on senior issues, services, and programs. The Senior HelpLine is THE Resource for Seniors in the Champlain Valley. Options counseling, referrals for case management services, meals programs, senior health insurance assistance and volunteers are made by calling the Senior HelpLine. In the past year over 10,000 calls were made to the Senior HelpLine. Ten percent of those calls were from the Burlington area of which 178 resulted in referrals to a case manager after screening by one of 3 information and assistance coordinators. There were 27 referrals for long term care Options Counseling for Burlington seniors

Nutrition and Healthy Aging programs are major components of CVAA’s services. CVAA provides community meals and Meals on Wheels to seniors. In the past year more than 235,000 meals were provided to seniors in the Champlain Valley. In Burlington, 98 new referrals were made to the Meals on Wheels program through our Senior HelpLine. Over 74,000 meals were served to Burlington seniors. The meals programs offer more than a hot, nutritious meal to seniors, they provide socialization and community contact. For at-home seniors they also provide a vital safety check on the individual’s well-being as well as a friendly visit for isolated seniors. The Healthy Aging programs like Tai Chi for Arthritis, Seated Yoga, strength training and walking programs help seniors maintain muscle tone, balance and healthy weight which prevent falls and maintain healthy physical and mental status.

The State Health Insurance Assistance Program (SHIP) provides free confidential health insurance counseling for all Medicare beneficiaries and people 60 and over. The SHIP counselors provide advocacy, information, prescription drug plan assistance and resolve Medicare billing issues. They also provide informational workshops for individuals new to Medicare and state health care programs.

CVAA’s volunteer services can help find assistance for seniors for a wide variety of everyday tasks like grocery shopping, yard work, friendly visiting and companionship. In the past year 200 volunteers provided assistance to seniors at home, 50 volunteered in the Burlington area. This does not include the over 900 volunteers for our meals programs.

4. If you plan to pay for staff with CDBG funding, describe what they do in relation to the specific service(s) / activity(ies) in your Project Narrative.

Specific Service / Activity	Position/Title	Work Related to CDBG-Funded Activity	# of Hours per Week spent on this Specific Service / Activity	% of Hours per Week spent on this Specific Service / Activity to be paid with CDBG
Options Counseling/Case Management	Case Manager	CM will work with senior and/or family caregiver to identify needs, develop action plan and implement plan.	40 hours per week	50%

		When ongoing case management is needed the case manager will continue to monitor and assess needs.		
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5. Explain how your agency has the capacity to carry out the proposed activity (i.e., staff qualifications and years of experience related to this type of activity, etc.)

CVAA has ten case managers serving Chittenden County. Three of these case managers serve the Burlington area. The case managers serving Burlington have worked for CVAA for a minimum of three years. The case manager that will be carrying out the proposed activities has worked as a CVAA case manager for twelve years. All of the case management staff is required to have a bachelor's degree in a related field and three years of related experience. We also have a case manager who is our Long Term Care Options Counselor and back up case manager. She is an MSW and will be available to back up the Burlington case manager as needed. Two supervisors with a total of 40 years of experience working for CVAA provide support and training to the Burlington case managers.

6. Have you received Federal or State grant funds in the past three years? Yes No

7. Were the activities funded by these sources successfully completed? Yes No
If No, please explain:

IV. Proposed Low & Moderate Income Beneficiaries / Commitment to Diversity

1. Will the program target any specific group of people? (check one below):

- Abused Children Elderly (62 years +) People with AIDS
 Battered Spouses Homeless Persons Illiterate Adults
 People with Severe Disabilities

2. For your proposed project, please estimate how the Burlington residents will break out into the following income categories. Use the Income Table at <http://www.burlingtonvt.gov/cedo/cdbq/2012-HUD-Income-Limits>.

Service / Activity	Unduplicated Total # of Burlington HH / Persons to be Served	# Extremely Low-Income	# Low-Income	# Moderate-Income	# Above Moderate-Income
Case Management/Options Counseling for project	140	14	98	21	7
Total Case Management clients served during period	480	48	336	72	24

3. Explain how the target population is selected, qualified and monitored.

CVAA serves all seniors requesting our help. Seniors needing assistance contact CVAA directly and speak with an Information and Assistance specialist who will assess the request, complete intake and assist the individual with the information or assistance required. If the individual needs the assistance of an options counselor or case manager a referral will be made to the appropriate person. We also receive third party referrals from family members, physicians, service providers, the police, EMT services, etc.

CVAA will also accept referrals from caregivers looking for options and information to help an older family member. Referrals are made for options counseling or the case manager or I&A specialist will sit down with the client and family members to mediate and share options – advocating for the identified wants and needs of the senior.

4. How do you ensure that your programs are accessible to all, inclusive and culturally appropriate?

We accept referrals for seniors regardless of income, race, ethnicity, gender, culture, etc. Our only criteria is that the client be 60 years of age or older. When necessary we access the assistance of an interpreter or other communication assistance. We provide training to our staff on cultural diversity and sensitivity.

When there is a funding source available we are able to provide assistance to younger people with disabilities, the Choices for Care Medicaid Waiver Program for example.

5. What steps has your organization/board taken in the past year to become more culturally competent?

We provided training this year on Lesbian, Gay, Bi-sexual and Transgendered Aging. We have also worked with the Department of Aging and Independent Living to obtain a grant to work with elder refugees. This grant will provide training to our staff on cultural issues related to the specific refugee communities that we work with. We will be providing training through CEDO this year with funds from the elder refugee assistance grant called We All Belong.

V. Budget / Financial Feasibility

1. Project Budget

Line Item	CDBG Funds	Other	Total
Wages	\$12,000	\$90,000	\$102,000
Fringe	\$3,000	\$23,000	\$26,000
Office/Supplies/Training/Travel/Other	\$0	\$57,725	\$57,725
Total	\$15,000	\$170,725	\$185,725

2. Funding Sources

	Project		Agency	
	Current	Projected	Current	Projected
CDBG	\$ 10,525	\$ 15,000	\$ 10,525	\$ 15,000
State (specify)				
State General Fund	44,600	66,000	1,267,787	1,299,906
State Other	6,500	0	279,424	323,464

Federal (specify)				
Title III OAA Funds	25,030	35,000	1,490,030	1,852,481
Fed Medicaid Waiver	53,660	55,000	536,610	550,000
Fed Other	26,370	10,400	623,690	365,171
United Way	3,750	4,100	112,845	100,000
Private (specify)				
Program Income				
Participant Donation			250,050	220,000
Other (specify)				
Local Community Donations	6,615	225	71,130	60,000
Fundraising			166,723	50,000
Investment Income /Misc			155,708	69,946
Total	\$ 177,050	\$ 185,725	\$ 4,964,522	\$ 4,905,968

3. Of the total project cost, what percentage will be financed with CDBG?

$$\frac{\$ 15,000}{\text{CDBG Funding}} \div \frac{\$ 185,725}{\text{Total Project Cost}} = \frac{8.08}{\text{Percentage}} \%$$

4. Of the total project cost, what would be the total cost per person?

$$\frac{\$ 15,000}{\text{CDBG Funding}} \div \frac{140}{\text{\# Proposed Beneficiaries}} = \frac{\$107.00}{\text{Cost Per Person}}$$

5. Why should CDBG resources, as opposed to other sources of funding, be used for this project?

We have case managers designated to specific areas of Burlington that deal directly with those seniors living alone or within various housing facilities. CDBG funds are directly supporting those services. Most of our Federal funding is specific to a program or service we provide. There is more awareness or public support for other elderly services such as Nutrition Meals on Wheels. Case management tends to be a less visible service and, since we cannot charge fees for our services we need to find other ways of making sure we have the financial support to be able to serve our seniors.

6. Describe your use of community resources. Include any resources not listed in your budget.

We request funding from all the towns and cities we serve. We receive contributions from the Addison, Chittenden and Franklin County United Ways. We do extensive fundraising within all of our communities. We apply portions of all these community resources to case management. Our case managers can not charge a fee for their services so whenever appropriate, donations are suggested.

We use volunteers extensively throughout many of our programs. Last year, several case management clients needed ramps for their homes which our volunteers built. We have volunteers shopping, transporting or just spending time with our clients. We have needed and found a number of volunteers in the past year to help with bill paying and balancing checkbooks.

We work very closely with our community partners, leveraging our assets and expertise to help solve problems for our clients.

7. **Has your organization experienced any significant changes in funding levels during the past year?** Yes No

If Yes, please explain.

8. What cost-cutting measures has your organization implemented?

Last year, we held off filling a vacant case management position due to financial concerns only. Two years ago we eliminated our employer contribution (\$100,000 savings). This year we reinstated an employer match only contribution (total contribution was \$17,000). For the past three years, our salary increases have been minimal (less than inflation). We converted our health insurance to a high deductible plan two years ago. The employee's share of the cost has increased each year. We eliminated bag suppers for our nutrition customers for this current year. This was a second meal (evening meal) which many seniors received (estimated saving for this year will be \$90,000). We have been aggressively cutting costs and seeking new revenue where ever and whenever possible.

VI. Community Support / Participation

1. What other organizations or key individuals (if any) have given support to this project?

The Department of Aging and Independent Living has provided support to this project through an ADRC grant that has provided training and support around implementation of Options Counseling.

2. How are the community or program participants involved in decision-making and/or identifying the program need, design and/or evaluation?

Our programs are client-directed and person-centered. The client is responsible for decision making once the case manager has presented all of the information and options available so that they can make informed choices about the services and programs they wish to participate in. The case manager can help individuals identify their own goals and desires for assistance and provide some guidance and support in the decision making process.

We survey clients to determine if the services that we are providing are meeting their needs and that they are satisfied with them. We also use our advisory committee and focus groups to regularly provide feedback on the services that we provide and to identify unmet needs in the community.

VII. Readiness to Implement

1. Is the project ready to begin on July 1, 2013 and be completed by June 30, 2014?

Yes No

If not, what are the expected start and completion dates?

2. List any conditions (i.e., obtaining permits, availability of other funding, etc.) that may affect your ability to begin or complete this project. None

VIII. Impact / Evaluation

1. Describe how this project will effectively measure outcomes.

We conduct a case management satisfaction survey yearly in which we have identified three specific questions that help us to measure our outcomes: Has the assistance provided helped you to meet your monthly living expenses?

Has the assistance provided helped you to remain in your home? Has the assistance provided helped to improve your quality of life?

This year we will also send surveys out to the people who receive Options Counseling from our case management staff to assess whether the options counseling has helped the individuals to make decisions about services and programs, whether their options counselor was well informed and provided them with the information they needed to make decisions and did the services meet their needs.

We will also collect data on the numbers of individuals served and the programs and services that our case managers helped them to access.

2. What strategies will you implement to collect the data necessary to analyze your results?

Our demographic data is collected electronically through case notes and assessments and we can create reports to quantify the data. The satisfaction survey data is entered into a Survey Monkey program which analyzes the data.

3. How are clients better off as a result of your program?

According to our last satisfaction survey 89.5% of respondents who had received some kind of assistance related to public benefits and other financial assistance felt that the assistance they received from the CVAA case manager had helped them meet their living expenses. Eighty-nine percent of those who received assistance obtaining in home care services felt that the assistance from the case manager has helped them to stay at home. Another 86% of respondents felt that the assistance provided helped to improve their quality of life. We believe that the clients we have served are better off as a result of our program.

IX. Sustainability

1. How will this project have a long-term benefit to the City of Burlington? If this project ends, will that benefit continue?

Case management for seniors is a valuable resource for information about services and programs serving seniors. Our program is a referral source to the city when there are older individuals that have been identified at risk and in need of care or services. We currently work collaboratively with most of the organizations serving Burlington residents and can provide senior's focused information and assistance that is not offered by any other organization in the community. We often work as part of a team to address the needs of frail, low income seniors. If the project ends we will continue to serve the seniors in Burlington as we would serve all seniors. In the future we may need to further prioritize what we do and how we do it which may mean waiting lists. But we are committed to serving the people who have the greatest needs.

2. Provide evidence of long-term support for this project.

We are supported in the work we do by the community organizations that we work closely with including the VNA, the Community Health Team, the local hospitals, nursing homes and residential care facilities. We also work with DCF, the Public Guardian Program, Adult Protective Services, local police and rescue squads, CVOEO, Burlington Housing Authority, HomeShare Vermont, Cathedral Square Corporation, SASH teams, Waiver teams and the LIT team. We have the support of the Vermont Legislature and the Department of Aging and Independent Living as well as many of the towns in our 4 county service area.

3. If CDBG funding ends, will the project be able to continue?

We rely on funding through the federal Older Americans Act which has been level funded for many years and funding through programs like the Choices for Care Medicaid Waiver. The Agencies on Aging around the state work with legislators to increase funding for services for seniors. Case management is a high priority for our agency. We provide a unique and necessary service to the community, one which will continue to grow in importance as the aging population grows. Despite funding deficits, we are committed to providing a high quality case management program to the community.