

PROJECT NARRATIVE

Home-based respite and support

a. Need

Citizens Who Care (CWC) serves the community's critical need to support frail elders' independent living and prevention of institutionalization. At the same time, the agency serves the mental health needs of families and provides a variety of significant services to isolated elders*

Caring for a family member who has the physical and mental disabilities of age is stressful to body and mind. Respite from such stress is a basic need. It is a need that most families will eventually experience. It is a need that is growing, because as people live longer, there is more care-giving. By 2010, nearly 40% of California's population will be over 65 years old. Older people usually live a longer and higher-quality life in their own home environment. At some point in our later years, in order to remain in our own home, most of us will need a caregiver- at first a family member or friend, later a paid person. The demands of care-giving can be very great. Most caregivers (55%) experience mental depression and are even more likely to experience physical injuries. Many caregivers are frail themselves with physical limitations. (Source: Family Caregiver Alliance, 2002)

Paralleling the population of older persons with caregivers are those elders who can still manage alone, single or in couples, but who live in isolation. They are not frail enough to need constant care but are vulnerable and, especially when the nearest family member lives far away, are often out of touch with the surrounding community. They need support a friendly, observant visitor, and referral to appropriate services.

CWC's clients are frail elders, most with family caregivers. Many clients have Alzheimer's or another type of dementia which places particular challenges on caregivers. CWC meets the need for family caregiver respite and isolated elder support with two programs: the In-Home Services program places a volunteer with a frail elder, in the elder's own home, for two hours each week. There is no fee. These scheduled visits provide support and socialization, and where there is a family caregiver, support and time off. This service is often the difference between a frail elder remaining in his or her home versus being prematurely placed in a convalescent hospital. The Saturday Time Off for Caregivers (TOC) program provides a scheduled day respite for caregivers. TOC provides five hours of fully staffed respite care two Saturdays per month. In many cases, this is the only extended time that caregivers have to themselves.

CWC clients come in pairs—the frail senior and the caregiver are both in need. CWC often uses the phrase “client families”. Support from CWC relieves and strengthens caregivers and their families. It reduces the emotional and physical demands of care-giving. It enables families to help their loved frail elder remain longer in his or her own home. Transfer to a long-term care facility often has a depressing impact, and every resource that supports independence is important.

This impact has a large financial component. CWC's clients are principally low to moderate-income. Convalescent hospital care in Yolo County averages \$6,500 per month. This looming financial burden alone substantiates the need for CWC's programs. Overall, CWC meets the emotional and physical health needs of clients and caregivers, and the family and community need to reduce the costs of advanced age.

The CWC overall budget cost per home-based client is about \$110 per month or \$28 per week (\$120,000 budget/90 annual clients/12 months/4 weeks). For the Saturday “Time Off” program, due to staffing requirements, the cost is higher, but it is offset by a monthly client fee. This \$80 fee is reduced or waived for those who have very low incomes. [Families who pay for private in-home respite service encounter fees of \$20 to \$25 per hour with a four-hour minimum. This equates to \$100 for only *one day* of private respite care. On a monthly basis, the private equivalent of CWC's program would cost \$200 per month (8 hours @ \$25). If the weekly visit is computed at the minimum required hours, the monthly cost would be \$400. The private equivalent of the Saturday program would cost a client family \$250 per month (10 hours @ 5/hr..)]

*Note: this proposal does not include funding for Citizens Who Care's Convalescent Hospital Visiting program. The needs addressed in this application pertain to “home-based” clients- those supported at home or who come from home to the CWC Saturday program.

b. Benefit

Volunteer-driven home-based respite care offers the frail elderly and their families the support needed to maintain quality of life and avoid premature institutionalization. CWC's volunteer/client matching system (see Scope of Services) provides regular, familiar social contact. The combination of caregiver respite and visitation improves the quality of life of the senior client and the client family. Volunteers and their client families remain friends for years, and many volunteers continue to visit their client even after convalescent hospital placement.

While the client and volunteer may decide to vary the schedule, in-home service of two hours per week is the standard. Hiring employees to pay for this service would increase the project's cost by about \$30,000 annually (average 30 clients x 12 months x 8 volunteer hours per mo x \$10 per hour = \$29,000).

The number of Davis clients and families served has increased in recent years. In 2003, 38 clients were served. In 2009-10, an anticipated 54 clients will be in the program.

The CDBG annual contribution per CWC home-based client was over \$350 in 2003-04. Anticipating reduced CDBG available funds, this application requests only \$278 per client. This is only 1/4 of the total \$1100 annual per-client cost to CWC. Our community fund-raising provides the rest. With these resources we will recruit, train and assign almost \$35,000 in volunteer labor.

In-Home Respite Care contributes to the quality of life of the caregiver and the senior. By providing the service with no fee (donations are encouraged but never required), the program remains available to Davis residents regardless of income. Home-based respite services result in strengthened families, increased caregiver well-being, and a substantial cost savings to the elders' families and our community.

TOC is a well-organized program of activities (see Scope of Services) that provides regular social contact. The combination of caregiver respite and group socialization improves the quality of life of the senior client and the client family. These participants will have access to a quality program at an affordable cost. The client base is increasing due to growing need and improved outreach. It will benefit 17 Davis residents in 2009-10. Time Off is the only weekend social respite program in Yolo County. The proposed services are considered Limited Clientele activities. This designation presumes the clients are principally low to moderate-income persons. Because the program is a Limited Clientele activity, the program fees are low – only \$40 per session. Fee reductions are also available. The program fees augment grant funds and unrestricted revenues. Use of program fees ensures program quality.

CWC's services are volunteer-based. The agency recruits, trains and matches volunteers to at-home clients. Saturday program volunteers come both individually and in service groups. They are matched to clients by the program director. Typically CWC will use 35 volunteers in a month (December 2008). Volunteers contribute two hours a week in clients' homes, five hours each session at the Senior Center (24 sessions annually). This results in about 2,500 hours of annual service. CWC estimates the annual value of this volunteer force at \$33,500.

The benefit of this volunteer product is many-fold. Besides providing service to its clients, the activities of CWC can be described as a "volunteer incubator", as many of our volunteers take what they learn at CWC to provide service elsewhere.

c. Other Resources and Collaboration

CWC receives 80 percent of its financial and in-kind support from individuals, charitable organizations and businesses in the community. Two community fundraising events are held each year. Local organizations including Right and Relevant store and dinner, Senior Citizens of Davis, Inc., several religious congregations, Soroptomists and the Venture Club have donated funds to CWC. It is difficult to obtain grants, and this source of revenue is not predictable for budget purposes. The agency benefited in 2007 from a \$10,000 grant from Catholic HealthCare West and in 2008 received a \$10,000 grant from the Rumsey Community Fund. United Way funding has been available in the past for our respite activities in Woodland. Area 4 Agency on Aging funds are no longer available. In recent years the City of Davis CDBG award to CWC has been reduced by about 50 percent.

Collaboration is key to CWC's success. The organization believes it provides a unique and critical service that is strengthened by relationships with other community organizations. The agency strives to fill its unique niche while avoiding duplication of services. CWC communicates with several senior service entities to receive and provide referrals, solicit feedback, and discuss emerging trends. Key contacts include Woodland Memorial and Sutter Davis home health services, Yolo Hospice, Yolo Adult Day Health Center, the Yolo Multi-Disciplinary Team, Yolo County Social Services and Older Adult Program, Yolo Elderly

Nutrition Program, Commission on Aging/TRIAD, and the Davis Senior Center.

Some clients utilize the services of more than one agency, and these contacts facilitate effective use of resources. For example, CWC, the Elderly Nutrition Program, and Yolo Adult Day Health Center communicate to identify clients. Each agency's programs are unique; as a result, Davis's frail elderly can maximize available support for their independence.

d. Organizational Capacity

Citizens Who Care (CWC) began in 1975 as an advisory committee of the Mental Health Association of Yolo County. By 1985, the organization established its Convalescent Hospital Visiting Program, and created its In-Home Respite Program in 1986. In 1988, the agency obtained nonprofit status per IRS 501(c)(3). Citizens Who Care currently operates three programs: In-Home Respite, Convalescent Hospital Visiting and Pet Visiting, and Time Off for Caregivers. These programs function as part of a countywide service continuum supporting the frail elderly.

Citizens Who Care has a history of effective program management. The agency has managed grants from the Cities of Davis and Woodland, Woodland United Way, The California Endowment, Sierra Health Foundation, Sacramento Regional Foundation, Catholic Healthcare West and the Rumsey Community Fund. In 2006-07 the City of Davis staff reported that in a federal audit review CWC was commended for its management procedures.

The agency's financial activities are managed by a volunteer professional Finance Officer. All expenditures require documentation (invoice, time sheet, etc.). The agency's Finance Committee and Board of Directors review all fiscal policies for appropriateness and internal and external accountability. CWC obtains an annual independent CPA audit.

All volunteers are screened and oriented before being placed in any CWC program, including In-Home Respite. Volunteers receive ongoing contact from CWC's Director of Volunteers, and have access to training opportunities through CWC and other senior service agencies.

Program data is tracked through multiple sources. All referrals are forwarded to the Assessment Nurse. The Assessment Nurse visits the client's home and determines his or her suitability for the program. Upon admittance, the Assessment Nurse completes an In-Take Packet. This documents basic data including age, ethnicity, medical conditions, income, etc. Each month, the Assessment Nurse reviews the client's file for any needed updates. These updates document any improvements or declines in health. The Assessment Nurse maintains the client file.

Citizens Who Care is governed by a 10 to 15 member Board of Directors. The board is comprised of standing committees including Finance, Human Resources, Program, and Fundraising. The board reviews financial statements monthly. As all personnel are part-time, the total FTE staff is 2.5 persons. The Executive Director has almost four decades of health care policy and management experience. CWC's assessment nurses have several decades of experience in public health and gerontology. CWC's Director of Volunteers has over nine year's experience managing volunteer programs.

SCOPE OF SERVICES

a. Project Description

The In-Home Services program will serve an estimated 37 Davis families in 2009-10, up from 34 in calendar 2008. Matched client families will receive two hours of weekly respite care—with Davis clients receiving up to 3000 cumulative hours of visiting and respite care. Because of the countywide demand for the services of the part-time Assessment Nurse, in late 2005 CWC created an additional part-time Assessment Nurse position. We continue to assign one position to Davis and one to Woodland, enabling CWC to more quickly assess needs and match volunteers to clients.

Most referrals begin with a telephone call. The Administrative Assistant documents the call and forwards the referral to the Assessment Nurse. The nurse makes contact with the potential client within 7 days, and an assessment is scheduled. The assessment occurs in the client family's home. It determines client appropriateness, identifies other community services of potential benefit, and notes interests/challenges that will influence volunteer placement. A suitable volunteer is interviewed and an introduction visit with the client family is arranged. If everyone is comfortable, respite visits can begin. CWC strives to place a volunteer with the client within 30 days of assessment. Following placement, caregivers are contacted by the Assessment Nurse every 60-90 days. The Director of Volunteers communicates with volunteers monthly. The Assessment Nurse maintains an ongoing status file on each client, documenting communication, challenges, etc. The nurses confer on case management

issues.

The Time Off for Caregivers Program provides weekend respite services on the second and fourth Saturday of each month, from 10 a.m. to 3 p.m. (5 hours). The program operates at space provided by the City of Davis at the Davis Senior Center. When necessary, Davis Community Transit van service provides transportation.

Referred clients are evaluated for participation in the program by the Assessment Nurse. The nurse advises the Program Director as necessary.

The Program Director prepares an activity plan for each session. She is responsible for preparing all necessary materials and supervising activities. A typical session includes morning refreshments, social time, arts and crafts, brief walks/exercise, music, games and lunch. The Program Director observes clients and provides feedback to caregivers when appropriate. She is also responsible for completing new client In-Take Packets, and monitoring client appropriateness for the program. The Program Director provides a detailed report of each program session to the Executive Director and the Director of Volunteers. She also confers as needed with the Assessment Nurse.

The Program Director supervises two program aides. The aide, who must qualify as a Certified Nurse Assistant or equivalent, is responsible for monitoring individual participants, and assisting with toileting and meal preparation.

The agency's Director of Volunteers recruits and screens volunteers for the program. She conducts outreach to area churches, service clubs, colleges and schools. The Director of Volunteers maintains regular contact with all volunteers and works with the Program Director to ensure adequate volunteer staffing for each session.

The Administrative Assistant supports the program by conducting initial screenings and coordinating program referrals and billings. The Executive Director oversees program administration including staff evaluation, surveys, and review of program reports.

b. Target Group

The program serves the frail elderly and their caregivers. Frail elderly are generally defined as seniors over 60 years of age experiencing one or more chronic conditions that restrict daily living.

c. Outreach

CWC promotes its programs through many methods. The agency distributes its brochures throughout the county. Brochures are maintained at senior centers, medical and social program facilities, and churches. The agency maintains a fully-descriptive website that includes printable forms for requesting services and becoming a volunteer. Finally, CWC distributes a newsletter three times annually to a readership of about 3000 persons.

CWC also uses its fundraisers, volunteer events, and other activities to maintain contact with its support base and to generate attention in newspapers and other media to elders' needs. These venues are also used to promote volunteer opportunities. The agency seeks out public speaking engagements and participates in several health fairs and public events each year.

PERFORMANCE SCHEDULE

<u>Activity</u>	<u>Work Plan</u>	<u>Completion Date</u>
Conduct family interviews and client assessments		Ongoing
Provide training for staff and volunteers		Ongoing
Refer volunteers to other educational in-service training opportunities in county.		Ongoing
Provide 24 Saturday Time Off sessions annually		Ongoing
Provide 2500 hours of volunteer visits to Davis at-home clients and relieve family caregivers		Ongoing
Conduct exit interviews with volunteer if/when service is cancelled.		Ongoing
Update Client Files		Monthly
Present status report to CWC Board of Directors including numbers served, funds expended, and challenges		Monthly
Prepare funder-mandated reports and reimbursement requests		Quarterly
Telephone contact between assessment nurse and client every 30 to 60 days- home visit when needed.		September 30, 2009 December 31, 2009 March 31, 2010 June 30, 2010
Conduct ongoing referral and intake of new clients for a total of 54 Davis in-home visiting and respite clients.		June 30, 2010
Serve an average of 12 families/caregivers per Saturday session		June 30, 2010
Recruit and orient 5 new respite volunteers to serve Davis clients.		June 30, 2010
Provide annual in-service group training to respite volunteers.		June 30, 2010

PERFORMANCE MEASUREMENTS

ACTIVITY (What the program does to fulfill its mission)	INDICATOR (The direct products of program activities) Service #s	OUTCOME (Benefits that result from the program)
Recruit and match volunteers with frail elders.	<p>More than 1500 hours of in-home volunteer community service to approx. 24 frail elderly persons.</p> <p>Caregivers are given much needed respite, elders have new friends.</p>	<p>Caregiver and family are supported and strengthened.</p> <p>Frail elder is able to stay longer in own home, rather than move to a convalescent hospital.</p> <p>Volunteers, elders and the community experience stronger social bonds.</p>
Conduct nurse assessment, support and ongoing monitoring of client needs.	<p>54 clients receive support, monitoring, information and referrals to needed services.</p> <p>Volunteers receive support and professional advice as needed.</p>	<p>Caregiver and family are strengthened.</p> <p>Frail elder is able to stay longer in own home, rather than move to a convalescent hospital.</p>
<p>Twice monthly, provide a stimulating 5 hours of activities for frail elders.</p> <p>Recruit, assign and supervise 35 volunteers during the year</p>	<p>120 hours of extended respite for the care-giving family, 120 hours of activities for elders who would be otherwise isolated</p> <p>Approx. 10 volunteers per session, over 1000 hours of direct service to frail elders (10 x 24 sessions x average 10 clients</p>	<p>Frail elders have fun, socialize and get moving; they maintain their level of functioning and strengthen their ability to avoid institutionalization.</p> <p>Frail elder is able to increase and maintain independent function, and stay longer in own home, rather than move to a convalescent hospital</p> <p>Caregivers are given much needed respite</p> <p>Elders make new friends</p> <p>Caregiver and family are supported and strengthened</p> <p>Volunteers, elders and the community experience stronger social bonds</p>

CITIZENS WHO CARE, INC.

2/5/09

Projected Budget Fiscal Year 2009-2010

INCOME	Budget 2008-2009	Projected 2009-2010	Davis Respite/ Home Visiting				
Grants							
Davis CDBG - Respite	5,417	15,000	15,000				
New Grants	10,000	10,000	3,000				
Woodland CDBG - Respite	6,000	7,500	-				
Woodland United Way	2,000	3,000	-				
Total Grants	23,417	35,500	18,000				
Revenue							
Donations	4,000	2,500	-				
Donor Drive	22,000	19,000	-				
Fundraising Events - WC, BF	41,000	38,000	-				
Fundraisers - 3rd party	5,000	4,000	-				
Interest Income	2,000	2,000	-				
Memorial & In-Honor Gifts	3,500	5,000	-				
Program Fees	7,500	6,000	4,000				
United Way Capital Region	2,000	4,000	-				
Endowment Distribution	8,000	2,500	-				
Operating Fund Reserve	11,693	7,650	-				
Total Revenue	106,693	90,650	4,000				
TOTAL INCOME	130,110	126,150	22,000				
Volunteer Labor - In-Kind	72,900	74,000	33,500				
EXPENSES							
Conferences/Training	300	150	75				
Cost of Generating Support	7,000	6,500	-				
Equipment & Software	250	250	-				
Insurance	3,900	4,000	1,300				
Memberships, Licenses, Misc.	1,200	500	-				
Mileage Reimbursement	1,500	1,500	800				
Office Supplies	1,500	1,500	175				
Outreach/Newsletter	3,900	4,000	-				
Payroll Taxes	7,560	7,400	3,150				
Postage	3,000	3,000	-				
Printing & Copying	1,000	1,000	250				
Professional Services	3,300	3,200	-				
Rent	5,150	5,200	975				
Supplies - Food and Crafts	2,500	2,500	2,000				
Telephone	2,000	2,000	325				
Volunteer Recognition	250	250	-				
Wages and Salaries	84,000	82,000	35,000				
Workers' Compensation	1,800	1,200	475				
TOTAL OPERATING EXPENSES	130,110	126,150	44,525				
Volunteer Labor - In-Kind	72,900	74,000	33,500				
Total Program Cost	203,010	200,150	78,025				
Profit (Loss)	-	-	(22,525)				

CITIZENS WHO CARE, INC.

2/5/09

Projected Budget Fiscal Year 2009-2010

INCOME	Budget 2008-2009	Projected 2009-2010	Davis Respite & Home Visiting
Grants			
Davis CDBG - Respite	5,417	15,000	15,000
New Grants	10,000	10,000	3,000
Woodland CDBG - Respite	6,000	7,500	-
Woodland United Way	2,000	3,000	-
Total Grants	23,417	35,500	18,000
Revenue			
Donations	4,000	2,500	-
Donor Drive	22,000	19,000	-
Fundraising Events - WC, BF	41,000	38,000	-
Fundraiser - 3rd party	5,000	4,000	-
Interest Income	2,000	2,000	-
Memorial & In-Honor Gifts	3,500	5,000	-
Program Fees - Time Off	7,500	6,000	4,000
United Way Capital Region Bequest	2,000	4,000	
Endowment Distribution	8,000	2,500	
Operating Reserve (Add'l fundraising)	11,693	7,650	-
Total Revenue	106,693	90,650	4,000
TOTAL INCOME	130,110	126,150	22,000
Volunteer Labor - In-Kind	72,900	74,000	33,500
EXPENSES			
Conferences/Training	300	150	75
Cost of Generating Support	7,000	6,500	-
Equipment & Software	250	250	-
Insurance	3,900	4,000	1,300
Memberships, Licenses, Misc.	1,200	500	-
Mileage Reimbursement	1,500	1,500	800
Office Supplies	1,500	1,500	175
Outreach/Newsletter	3,900	4,000	-
Payroll Taxes	7,560	7,400	3,150
Postage	3,000	3,000	-
Printing & Copying	1,000	1,000	250
Professional Services	3,300	3,200	-
Rent	5,150	5,200	975
Supplies and Services	2,500	2,500	2,000
Telephone	2,000	2,000	325
Volunteer Recognition	250	250	-
Wages and Salaries	84,000	82,000	35,000
Workers' Compensation	1,800	1,200	475
TOTAL OPERATING EXPENSES	130,110	126,150	44,525
Volunteer Labor - In-Kind	72,900	74,000	33,500
Total Program Cost	203,010	200,150	78,025
Profit (Loss)	-	-	(22,525)

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**CITY OF DAVIS
COMMUNITY DEVELOPMENT BLOCK GRANT
2009-2010**

**CITIZENS WHO CARE, INC.
DAVIS RESPITE/HOME VISITING PROGRAM**

Budget Category	Proposed Project CDBG Portion	Other Sources	Total
A. Salaries and Wages	12,500	22,500	35,000
B. Payroll Expense	1,150	2,475	3,625
C. Volunteer Labor (In-Kind)	0	33,500	33,500
TOTAL PERSONNEL BUDGET	13,650	58,475	72,125
D. Office Rent	200	775	975
E. Telephone	75	250	325
F. Program Supplies	400	1,775	2,175
G. Printing & Copying	50	200	250
H. Travel	200	600	800
I. Other			
Liability Insurance	400	900	1,300
Training	25	50	75
TOTAL NON-PERSONNEL BUDGET	1,350	4,550	5,900
TOTAL PROJECT BUDGET	15,000	63,025	78,025