Applicants for Milwaukee County Department on Aging (MCDA) funding to provide **Late Life Counseling (LLC)** must comply with and incorporate the follow specifications and guidelines.

Applicants must include a description of how they will meet specific guidelines, program activities, and provider responsibilities in the indicated section(s) of *(Exhibit I, Section II, #2) Description of Proposed Programs and Services.*

1. **Program Activities**

   a.(1) Provide Late Life Counseling to Milwaukee County's older adults. The primary goal of LLC is the amelioration of stress in the older adult with the improvement of coping mechanisms. Special areas of concern will include: isolation and loneliness, depression, physical and mental decline, separation anxiety and loss, fear of death, changing role and self-concept, changes in interpersonal relationships, prejudice against the ages, and financial problems.

   (2) Treatment will take place in the client's home. The primary method of treatment is individual counseling provided by a social worker.

   (3) Ongoing counseling may include sessions with caregivers/family members in the home or elsewhere to focus on coping with the needs of the homebound person.

   (4) On a case-by-case basis, (with case worker discretion and MCDA approval) upon the loss of the LLC client, one to four sessions may be held for grief counseling and/or referral for grief counseling to assist surviving caregivers/family members in the adjustment to loss.

b. Educate potential sources of referral about how to refer, when to refer, and where to refer for LLC. Potential referral sources will include health and social service professionals, as well as members of the general public. Effort should be made to target agencies, programs and organizations servicing the elderly with special emphasis on MCDA funded programs and services.
2. Program Goals and Objectives

Applicants must specify the measurable program objectives and the methods and time frame to achieve them. The objectives must relate to the proposed program and services. The methods must specify the operational or quantitative steps to accomplish the objectives and measure the outcomes. The time frame should indicate when the objectives will be completed. (Section II, #2 F of Exhibit 1.)

3. Performance Outcomes:
Applicants must specify at least one measurable program outcome and the methods and time frame to achieve the outcome. This outcome will be measured by the service provider agency. Data collection will be the responsibility of the service provider agency. MCDA contract staff will provide technical assistance if needed. (Section II, #7)

4. Unacceptable Program Activities
   a. Inpatient psychiatric or medical care.
   b. Referrals from the judicial system, e.g. legal competency evaluations.
   c. Extensive direct intervention with the environment, e.g. mediating landlord-tenant disputes.
   d. Service to diagnosed alcoholics or chronic drug abusers.

5. Initiation of Services
   a. Late Life Counseling may be requested by:
      (1) The individual.
      (2) A relative or friend,
      (3) A health or social service agency,
      (4) A physician.
b. The client should have had a medical exam within the past year or should presently be under the care of a physician. If neither is the case, a referral to a physician should be initiated, along with follow-up of the referral.

c. An assessment must be conducted before treatment may begin. The assessment is to include a visit with the homebound person and caregivers/family members, and, if appropriate, a follow-up visit in the home or in other suitable locale with caregivers/family members.

The treatment plan must include, but not be limited to, the presenting problem(s), the treatment goals and the treatment objectives. A master-degreed social worker or a provider with an equivalent degree and appropriate experience must conduct the assessment and subsequent counseling. Where appropriate, a psychiatrist or psychologist may be used as a consultant.

6. Completing of Service

Late Life Counseling will be completed when:

a. The goals of therapy have been achieved;

b. The client terminates treatment;

c. The therapist feels that counseling has become unproductive or harmful to the client.

7. Limitations on the Provision of Services

After six (6) months of continuous LLC, the client will be re-evaluated. The purpose of the re-evaluation is to determine if continued counseling is productive and cost effective.

8. Eligible Clients

a. All clients must be 60 years or older, homebound, and residents of Milwaukee County, and in need of short-term LLC.

b. A client needing long term counseling must be identified as such by an interdisciplinary assessment team consisting of a psychiatrist or psychologist and one or more MSW's.
c. Priority must be given to older persons who have the greatest economic and social need as defined by the Older Americans Act.

"The term 'greatest economic need' means the need resulting from income level at or below the poverty levels established by the Office of Management and Budget.

The term, 'greatest social need' means the need caused by non-economic factors that include physical and mental disabilities, language barriers, and cultural, social, or geographical isolation including that caused by racial or ethnic status which restricts an individual's ability to perform normal daily tasks or which threatens such individual's capacity to live independently."

d. Priority must be given to those clients referred by MCDA.

9. Generating Clients

Applicants must clearly indicate how they will generate eligible clients for this program.

10. Follow-up of Service Delivery

a. All clients, for whom a formal treatment plan is developed and whose treatment is terminated by mutual consent, must receive agency follow-up. Follow-up will be conducted in person or by telephone approximately three months after treatment is terminated to determine if the goals of treatment were met, whether the service was performed to the client's satisfaction, whether the service was performed in a courteous and understanding manner, and whether the client requires other services that may be available in the community, e.g. transportation, legal assistance. Subsequent follow-up will be contingent upon the judgement of the counselor.

b. Follow-up will be conducted, to the extent possible, by the counselor for those clients who terminate without the consent of the counselor.
11. **Program Personnel**

(a) Applicants must submit a staffing plan, including the job
descriptions for each person receiving full or partial MCDA funds
involved in this program. *(Appendix 1 of Exhibit 1)*

(b) Recognition will be given to those programs that employ older
adults age 45 or over in the provision of services.

(c) Persons providing counseling must possess the following
qualifications:

1. A master's degree in social work or an equivalent degree.
   Appropriate experience from a school accredited by the
   professional or regional accrediting agency, with emphasis on
   psychiatric counseling.

   A graduate student who is doing an internship under the
   supervision of a master’s degree service provider with the
   appropriate experience and training from an accredited school.
   This supervision will include weekly meetings between clinician
   and student, participation in all agency clinical meetings and in-
   service training programs, reviews of the students’ clinical reports,
   and evaluations of the student’s progress. All qualifications
   required of persons providing counseling will also apply to
   graduate students.

2. Successful completion of some research methodology courses as
   part of his/her degree requirements.

3. Knowledge of community resources.

4. Expressed interest in aging.

5. Sensitivity to and awareness of the special problems of the elderly.

6. Experience working with older persons is desirable.

(d) Personnel funded wholly or in part by MCDA must spend a
percentage of their time on MCDA supported activities equal to the
percentage of their compensation paid the MCDA funds.
12. **Training**

As part of on-going training, the social worker must participate in regular staffings to remain informed of current trends in mental health counseling.

13. **Program Organization**

a. Applicants must clearly show the lines of responsibility within the proposed program and the relationship of the program to its parent agency. Applicants must submit an organization chart, which delineates those lines of responsibility. ([Appendix 2 of Exhibit 1](#))

b. Applicants must clearly identify the individual within the program and/or agency who will be
   1. Solely responsible for overall administration of the program.
   2. Authorized to sign for the agency and program.
   3. Authorized to receive checks for the program.
   4. Responsible for fiscal and budgetary matters.
   5. Responsible for data reporting and monthly reporting forms.
   6. Responsible for internal monitoring of the program.
   7. Responsible for handling consumer and client complaints with respect to program activities.
   8. Responsible for the collection, tabulation, recording and depositing of client contributions.

14. **Other Program Requirements**

Applicants must clearly describe their emergency plan for maintaining the provision of services to older adults through this program in the event of an emergency.

15. **Alternate Sources of Reimbursement**

Applicants must clearly show how they will determine whether each client is eligible for alternate sources of reimbursement. Sources to be investigated may include Title XIX of the Social Security Act, Veterans Administration benefits, private insurance, local government, voluntary health agency support, or private pay. MCDA funding will only be used when other funding sources are unavailable.

16. **Contributions** ([Section II, #2, Exhibit 1](#))

Applicant agrees to provide clients with the opportunity to make a voluntary contribution toward the cost of LLC in accordance with prevailing MCDA policy. Applicant must include a copy of their contribution policy, ([Appendix 7](#)).
17. **Reimbursement**

Services provided under this program will be reimbursed on the basis of actual costs as identified in the approved program budget.

18. **Billing and Reporting**

a. Using forms provided by the Department on Aging, the provider must submit by the fifth working day of each month reports indicating the previous month’s expenditures and the services provided.

b. All providers are required to implement the National Aging Program Information System (NAPIS) to fulfill state and federal reporting requirements.

19. **Insurance Requirements/Specifications**

“Applicants must maintain minimum insurance coverage determined by the Milwaukee County Risk Manager in the following areas:

1. General liability;
2. Automobile liability;
3. Employers liability;
4. Workers compensation;
5. Waiver of subrogation for workers compensation in favor of Milwaukee County;
6. Comprehensive Crime/Employee dishonesty;
7. Milwaukee County Department on Aging as additional insured for general liability;
8. Milwaukee County Department on Aging as additional insured for automobile liability;

The Department on Aging will not award a contract unless the applicant secures adequate coverage, as defined by County, provides certificate(s) of insurance that includes all items listed above.”

**Bonding Requirement**

$10,000 or 10% of contract amount, whichever is greater, through either a fidelity bond or as part of comprehensive crime coverage; for agencies with multiple contracts, coverage must be based on the dollar amount of the largest contract.