**2015 Department on Aging**
**PROGRAM SPECIFICATIONS/GUIDELINES**

Applicants for Milwaukee County Department on Aging (MCDA) funding to provide **Telephone Reassurance Services** (TR) must comply with and incorporate within program operations the following specifications and guidelines.

Applicants must include a description along with measurable objectives and outcomes of how they will meet specific guidelines, program activities, and provider responsibilities in the indicated section(s) of **Exhibit I, Description of Proposed Programs and Services.**

1. Program Activities and Provider Responsibilities

Provide TR Services to Milwaukee County's older adults who are unable to receive TR Services through any agency and who are currently not receiving other daily services such as Home Delivered Meals, etc. TR Services must include all of the following:

a. A daily telephone call to check on the well being of an older adult.

b. Recruiting and matching volunteers/staff with recipients.

c. Coordinating TR Services or referring applicants to other appropriate providers.

d. An emergency procedure in the event a TR volunteer/staff cannot contact a recipient. This system must include the following:

   1) Notifying the emergency contact(s) listed on the recipient's intake form.

   2). Notifying the Fire/Police Department or Paramedics or appropriate source.

e. Maintain a computerized database for each client, that includes information such as client name, address, phone number, name of volunteer/staff, emergency contact, other agencies serving client.

f. Develop and implement a marketing plan that include on-going outreach and recruitment to increase both the numbers of clients and volunteers.

g. Develop a referral mechanism with MCDA's Resource Center for possibilities of functional assessments for each client.

h. TR staff will call each client at least two times each year to verify that volunteers are making their assigned calls.

2. Program Goals and Objectives

Applicants must specify the measurable program objectives and outcomes and the methods and time frame to achieve them. The objectives and outcomes 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 would be completed. **(Section II of Exhibit 1)**

**Provider will be required to implement and measure at least one outcome in 2015 and complete annual client satisfaction surveys with results to be provided to MCDA Program Coordinator. The outcome along with implementation guidelines and measures must be stated in the proposal.**

3. Unacceptable Program Activities

Telephone companionship (i.e. visitation on the telephone).

4. Eligible Clients

a. To be eligible for TR Services, clients must be 60 years or older and reside within Milwaukee County.

b. Clients must either live alone or live with an incapacitated spouse.

c. Clients are unable to receive TR services through place of residence, municipality or other agency.

5. Initiation and Discontinuation of Services

a. TR Services may be requested by a referral by a health or social agency, a request by a relative or friend, a personal request for TR Services, a referral by a physician.

b. TR Service is initiated upon completion of an initial telephone interview with a recipient and matching of a recipient with a volunteer/staff. TR volunteers/staff place daily calls to recipients at a mutually agreed upon time and then contact the agency to report this activity. The agency monitors the daily operation and intervenes when necessary when volunteers fail to follow through.

c. TR Services will not be provided/will be discontinued when:

1) The client withdraws the request;
2) A referral has been made to and accepted by another resource;
3) It has been determined that the service is no longer appropriate or necessary.

6. Limitations on the Provision of Service

a. Minimum contact per client: one call per day, five to seven days per week throughout the year.

b. Maximum duration of service: none.

7. Generation of Clients

a. The agency will perform outreach and promotional activities to generate TR clients. (See Section 1 F above)

b. The agency will accept all appropriate referrals from the Department on Aging and other agencies serving older adults.

c. Priority must be given to older persons who have the greatest economic and social need (as defined by the State of Wisconsin, Bureau on Aging). The Act defines these terms as follows:

"The term 'greatest economic need' means the need resulting from an 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 which 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 the Milwaukee County Department on Aging.

8. Program Personnel

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

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

c. Personnel funded wholly or in part by the Department on Aging must spend a percentage of their time on Department on Aging supported activities equal to the percentage of their compensation paid with Department on Aging funds.

d. Plan must include a supervisor and coordinator for TR, whether or not those person's positions are funded by MCDA.

9. Training

a. Agency staff training will include, but not be limited to, volunteer management, maintenance or accurate record keeping and community services.

b. A training log must be kept of in-service training. The log must contain the topic(s) of the training sessions, the date, the name and qualifications of the trainer, the names of the persons attending the training and the duration of the training.

c. Training of TR volunteers/staff should include but not be limited to the following: and orientation on their duties and responsibilities, expectations, and what to do in an emergency situation.

10. Clients Records

The agency will develop a computerized data base, which must include the following:

a. Client information that includes client name, address, phone number, name of volunteer/staff, emergency contact, other agencies serving client. (See Section 1 E above)

11. Program Organization

a. (**Appendix 2 of Exhibit 1),** 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.

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.

12. Other Program Requirements

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

b. Applicants must demonstrate their agency's stability and viability.

13. Billing and Reporting

a. Each month the agency will submit a list of the names of all TR recipients and volunteers who received TR during the month. The list will indicate new TR recipients and volunteers, as well as the names and status of recipients who received service during the previous month, but who did not receive service during the month being reported (for example, deceased, nursing home, etc.). This list must be submitted to the Department on Aging along with the Service Report and other required reports by the fifth working day of each month.

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

14. Contributions **(Section II in Exhibit 1)**

Applicant agrees to provide clients with the opportunity to make voluntary contributions toward the cost of TR Services in accordance with prevailing Department on Aging policy.

If applicant agency uses a letter to generate contributions, a copy of that letter is to be attached in the proposal as **Appendix 7.**

15. Reimbursement

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

16. 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.