

INTEGRATED SERVICES: THE DEPARTMENT OF ADULT AND AGING SERVICES IN ALAMEDA COUNTY

Susan Arding*

EXECUTIVE SUMMARY

Demographically and geographically, San Francisco and Alameda Counties bear closer resemblances than other Bay Area Counties. Both have major metropolises, linked by the San Francisco-Oakland Bay Bridge. Alameda County Department of Human Services has an already established integrated Division of Adult and Aging Services. San Francisco County has been providing these same services, but now looks to provide them in a different configuration of administration; a stand alone Department of Adult and Aging Services, outside of the Department of Human Services, the traditional administrative home.

The establishment of a new department to provide services to adult, disabled and aging San Franciscans brings challenges. The goal of my BASSC internship was to look to Alameda County's management of these services, so that its strengths might be replicated during the department's formulation. Recommendations for San Francisco County action steps were a key task for me as I observed the integration of services.

Linda Kretz, Division Director of the Department of Adult and Aging Services, facilitated my learning about the adult services areas of her division. During my internship, I interviewed managers and supervisors from all of the program areas of the division, and attended management meetings, contract renewal evaluation committees, and community organizing meetings focused on long-term care

planning. I was included in meetings of Bay Area Division Directors as they strategized and worked toward forming stronger alliances for the promotion of their common client population.

With the developed world population aging, to the extent that one in four adults will be 65 years or older in Year 2020, services to this population must be enhanced, coordinated, and provided with efficiency. San Francisco must learn from our neighboring county's successes so that the most efficient provision of compassionate care may be provided to the aging and adult San Franciscans.

I submit the following recommendations based on Alameda County's strengths:

- *Observed Strength:* Carefully arranged program and staff co-location to facilitate efficient communication, partnership, and case transfers.
- *Recommendation:* Committees of management/supervisors staff from the converging programs should convene as soon as possible to evaluate program connections. Location of staff should be determined by function, connection, efficiency, and case flow.
- *Observed Strength:* Management meetings inclusive of supervisory staff convene on a monthly basis.
- *Recommendation:* Management meetings, that include supervisors could begin on a regular basis as soon as department definition is determined.

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- *Observed Strength:* Community involvement in decision making shows respect to the client and caregiver community and shapes services that are most likely to succeed.
- *Recommendation:* Community board representation should be included at the table during new department formulation and thereafter.
- *Observed Strength:* Alliance with the Bay Area Counties' Adult and Aging Services Directors is critical in defining common needs and accomplishing common goals, including the political negotiations.
- *Recommendation:* Define the current alliances, both weak and strong, by sharing history and activities. Determine which alliance should be transferred to the new department to strengthen and support the transition.
- *Observed Strength:* A clear voice to the County Welfare Directors Association for legislative advocacy action and support is critical.
- *Recommendation:* As Adult Protective Services and In-Home Supportive Services are moved to the new administration, a well-structured pathway to voice the needs and requests of Adult and Aging Services must be preserved and promoted.

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INTRODUCTION

Amidst voices of both skepticism and support, government leaders make decisions that shape the services received by their constituency. San Francisco County is planning to establish a separate and new department of San Francisco city/county government, an umbrella agency for Adult and Aging Services. As this decision was publicly announced during the Autumn of 2000, my BASSC internship was approaching. Concurrently, the Director of the San Francisco Department of Human Services announced his resignation. Mindful of the task of assisting in the smooth transition of programs, the Acting Director, Trent Rohrer, who has since been appointed Human Services Department Director, guided my choice of BASSC internship toward an intensive overview of the integration of Alameda County's Department of Adult and Aging Services.

BACKGROUND

With 19 years of Child Welfare practice, in various roles from line staff through management, gaining an understanding of all of the facets of social service delivery to a different and diverse target population promised to be an enriching management trainee experience. My internship was hosted by Linda Kretz, Director of the Alameda County Department of Adult and Aging Services. This is a department of the Alameda County Social Services Agency.

The Department of Adult and Aging Services is an integrated and collaborative agency of adult, disabled, and senior services. Linda Kretz directs

three program managers who oversee the following programs: Area Agency on Aging; Adult Supportive Services; Adult Protection (see Attachment). The clerical management and facility operations staff also report to her. Ms. Kretz is the administrative liaison to the Public Authority in its function as registry for in-home workers and in its oversight of In-Home Support Service staff.

The Department of Adult and Aging Services was co-located from outlying sites, when the current location at 8000 Edgewater was acquired and remodeled in 1996. Linda Kretz, who was appointed Director in 1993 after much experience in both community-based organization management and Alameda County Senior Services Management, believes in inclusion and co-location. For example, in meetings she holds the agenda until everyone is sitting at the table (no back row allowed!). She believes and maintains the practice that if differing program staff sit together, eat together, and play together, they will also serve clients together. Linda Kretz allowed me to shadow her for most of a two-week period. She arranged interviews and experiences with all key management staff to accelerate my learning, as well as to provide me a view of an interactive management model.

INTEGRATIVE MANAGEMENT

The managers and supervisors of all department programs meet with monthly regularity. These meetings, convened by the director or an appointed program manager are jovial, roundtable meetings, with refreshments furnished in rotation, by attendees. There is notable lighthearted, friendliness between

staff that promotes amusing interchanges. The meetings begin with welcomes and birthday announcements. The March meeting guest was the social services agency legislative analyst who gave updates on the status of adult and aging bills, presented the Year 2001 Legislative Calendar, and asked for staff requests for future legislation. This legislative analyst has a voice in, and participates at, the County Welfare Directors Association Committees, as needed. State legislation is formulated, supported, and followed through the legislative process. The agenda continued, with agency and department updates: a) executive committee; b) program reports; c) activity reports; and d) staffing changes. All program staff were informed of the issues involving other programs.

The April meeting revealed two particularly important aspects of integration: Staff hiring assistance and employee appreciation event coordination. An Adult Protective Services (APS) Manager announced that two graduate school interns were completing their internships that month. As the county civil service application was not yet available, they were applying for employment in the other Bay Area counties. The manager from Adult Services and In-Home Support Services, whose Social Worker III position is consistently open, upon hearing that the trained interns may be lost to other counties suggested that the director explore hiring the interns provisionally, as Social Worker IIIs until the APS Application is opened. This creative solution was made possible by this collaborative meeting style where members openly shared problems and possibilities.

The second accomplishment of the April meeting was the planning of the annual Employee Appreciation Picnic, funded and entirely produced by the management. With laughter and frivolity, but

also with detailed organization, the managers of all the programs planned this yearly event for all their staff. This integrative event as well as the preparations for it remove barriers, both for staff and for management; and subsequently, for clients. The belief behind this management activity is that staff who enjoy life together, work better together toward common goals.

COMMUNITY INCLUSION

Both in policy formulation and in contract review committees, service recipients are active participants. The Area Agency on Aging administers contracts of community-based organizations for provision of various service needs of the adult disabled and senior populations. As I participated in these contract reviews, the populations served were represented by clients who sit on the boards. Their voting presence changed the nature of these meetings, as they contributed insight that could have otherwise been lost. There is potent community presence, as well, in the Long-Term Care Integration Steering Committee. This committee of concerned community partners with various backgrounds, including community-based organizations, clients, and interested people, meet to: a) develop the a vision for the provision of services, b) define and summarize assumptions regarding expectations of the care system, and c) define guiding principles. This planning body is moving toward the development of a website for the making of appropriate services accessible to the adult population.

INTERNAL COLLABORATION

Co-location has integrated service programs for adults and seniors in visible ways. I observed the manager of In-Home Supportive Services on the telephone with a client. Immediately after the call,

I watched her arrange for the In-Home Support Services and an Adult Protective Services worker to do a joint visit with the client, whose relative caretaker is suspected of neglectful abuse. This manager had been a long-time Adult Protective Services staff person. Her knowledge of both programs allowed her ease in arranging a joint intervention.

Another common programmatic linkage is the flow of cases from Adult Protective Services to the Public Guardian/Legal Conservator caseloads. As the department has outgrown the building, having almost doubled in size since 1996. APS and Public Guardian/Lanterman-Petris-Short are not co-located, but across the street from each other. The department plans to move during the next fiscal year to allow the co-locating of these programs. The sharing of common administrative oversight, even without the co-location, is believed to be valuable. For example, when the APS Worker had not completed a detailed narrative description of the circumstances of a client before referring the case to the Public Guardian Unit for court action, the omission was observed through shared management oversight. Subsequent requirements for narratives is due to shared management and in-house expertise. The manager looks forward to co-locating these staff to improve program coordination.

One of the primary goals of the Agency is the creation of a common intake screening tool that will assess the need for available services. This development is part of the county's strategic plan for this department, and will provide additional support integration of services.

THE POLITICAL CONVERSATION

As I interviewed program staff to understand the scope of the Department of Adult and Aging

Services, I sought for recommendations for San Francisco County. In addition to the successes of integration and co-location of services, four experiences provided me with insight regarding the strengths of the Alameda County department.

On a Friday, Director Linda Kretz convened a meeting of potential applicants for grant monies under the Title III-E, Older Americans Act. She had an understanding that the National Family Caregiver Support program Funds (federal monies) would be disbursed. She had been made aware that RFPs could soon be formulated and distributed. The meeting was a convening of interested parties to define the service categories, funding levels and timeframes, as well as to answer any questions that might be asked to allow for funded programs to provide service "as soon as the money became available through the state." This meeting gave notice so that better and faster responses prior to the formal issuance of the RFPs, could be prepared.

The following Wednesday, in a private conversation, I observed the director describe that she had learned that a legislative lobbyist for a large network of Family Caregiver Resource Centers had maneuvered the delay of the issuance of funding to the counties for the RFPs that had been described to the community members in the previous Friday's meeting. The lobbyists' organization had invited the directors of the Bay Area departments to a meeting in his organization's office the next morning (Thursday).

The directors convened at the office of the Resource Center Agency. Linda Kretz, a leader in the group, delicately but firmly challenged the maneuvering of the lobbyist. The staff at the Resource Center Agency described the focus and goals of their intent. The directors and Resource

Center staff jockeyed and bargained in subtle ways. The directors described their areas of emphasis, and provided a handout describing their 2001 Statement of Preferred Public Policies.

Only when the week culminated with the convening of the directors in Santa Clara County, hosted by Betty Malks, was the lesson complete for me. The focus of this meeting was the building of strategies to have a clear voice to the County Welfare Directors Association (CWDA) regarding legislative requests and recommendations. The CWDA has a strong and respected voice that is influential in stating constituencies' needs, as well as countering lobbyists' maneuvers. When the Department of Adult and Aging Services is distanced or disconnected from the CWDA, its influence is weakened. The counties whose services for aged and disabled clients are not under the umbrella of the County Welfare Directors Association are less likely to have support for proposed legislative actions, unless this avenue of voicing clients' needs is carefully tended.

CONCLUSIONS/RECOMMENDATIONS

The Alameda County Advisory Commission on Aging published the "Senior Update". In Volume III, Issue 6, Mary S. Kaufman includes pertinent data:

"According to the Center for Strategic and International Studies Report (2000) two-thirds of all the elderly who have ever lived are alive today. Prior to this time, those over 65, accounted for no more than 2-3% of the population. Today, in the developed world, it amounts to almost 15%. By 2020 nearly 1 in 4 adults in the developed nations will be age 65 or older."

Given these facts the decision to formulate a Department of Adult and Aging Services is timely for San Francisco County. Service programs must be united with mindfulness of the diverse history of the programs and states. It must be conducted with client needs upheld as the primary focus, and territorialism set aside. I submit the following recommendations based on Alameda County's strengths:

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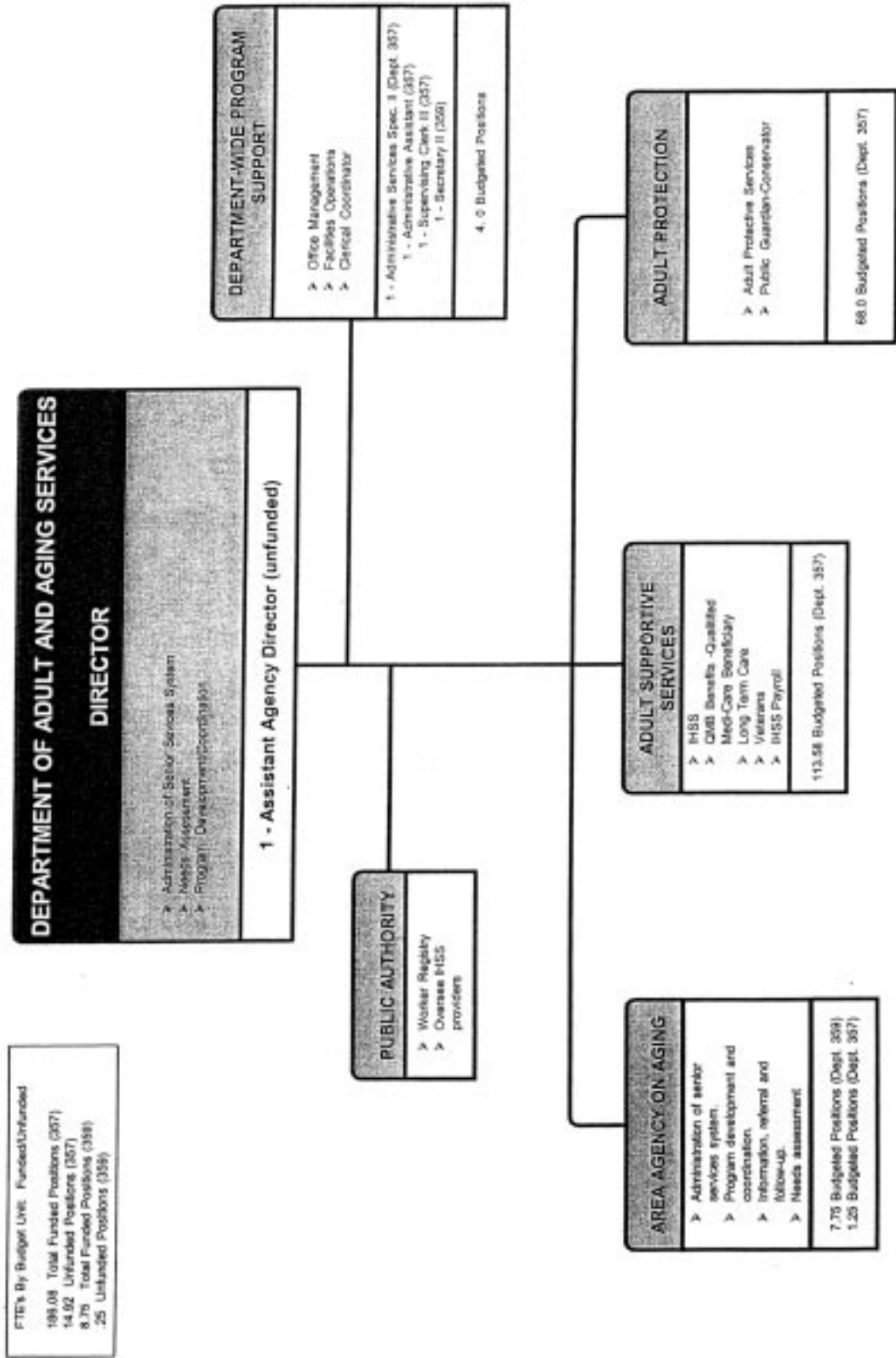
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CONCLUSION

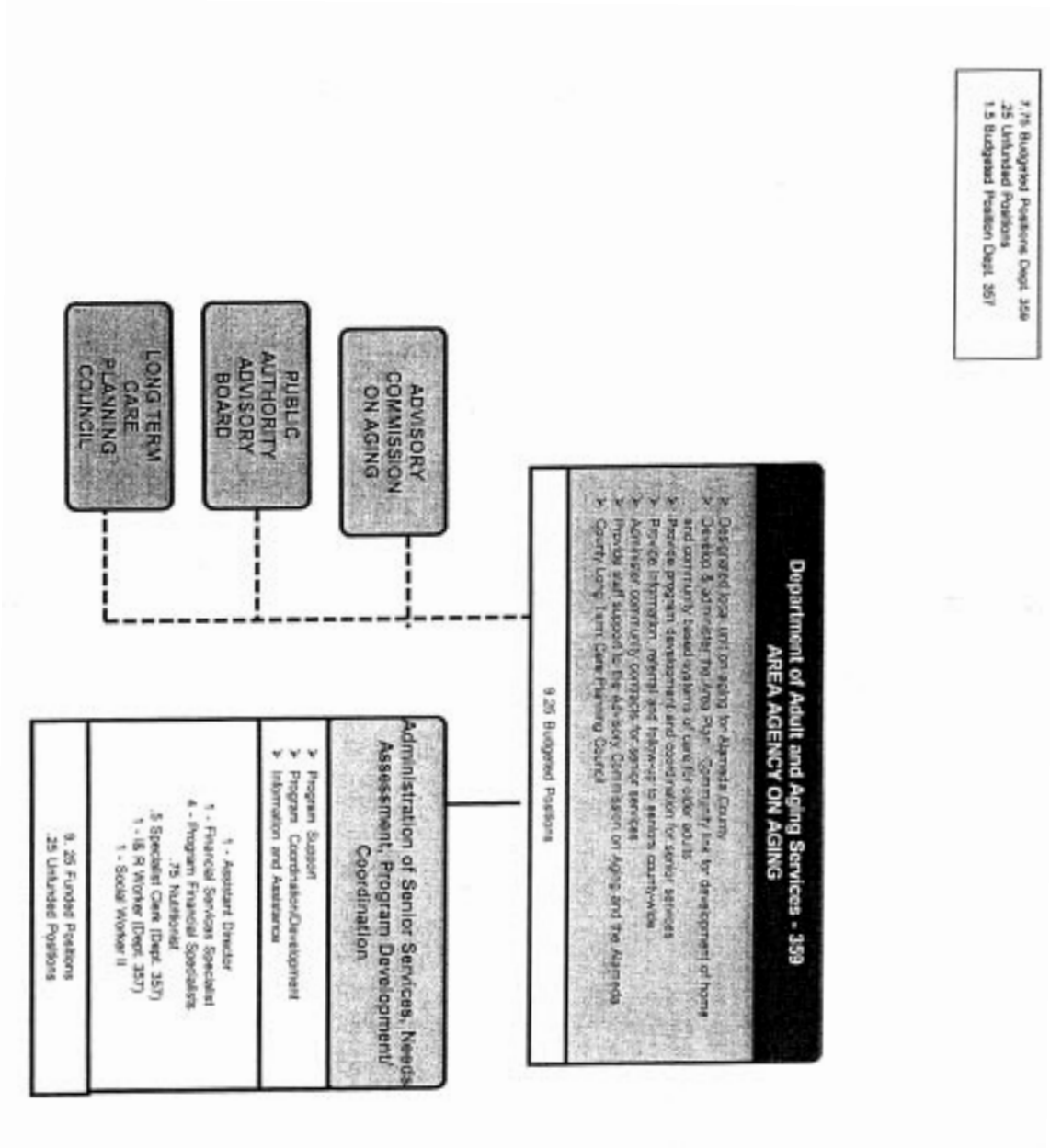
As the population shifts in demographics, all Human Service Providers will be changed. Alameda County has begun this process from a position of strength, having formulated a Department of Adult and Aging, with a strong leadership and strong community involvement. The agency and the community are working together to state a common vision. In a meeting of partners on 3/21/01, Agency Director Linda Kretz sat in the midst of these partners and in a matter-of-fact way stated,

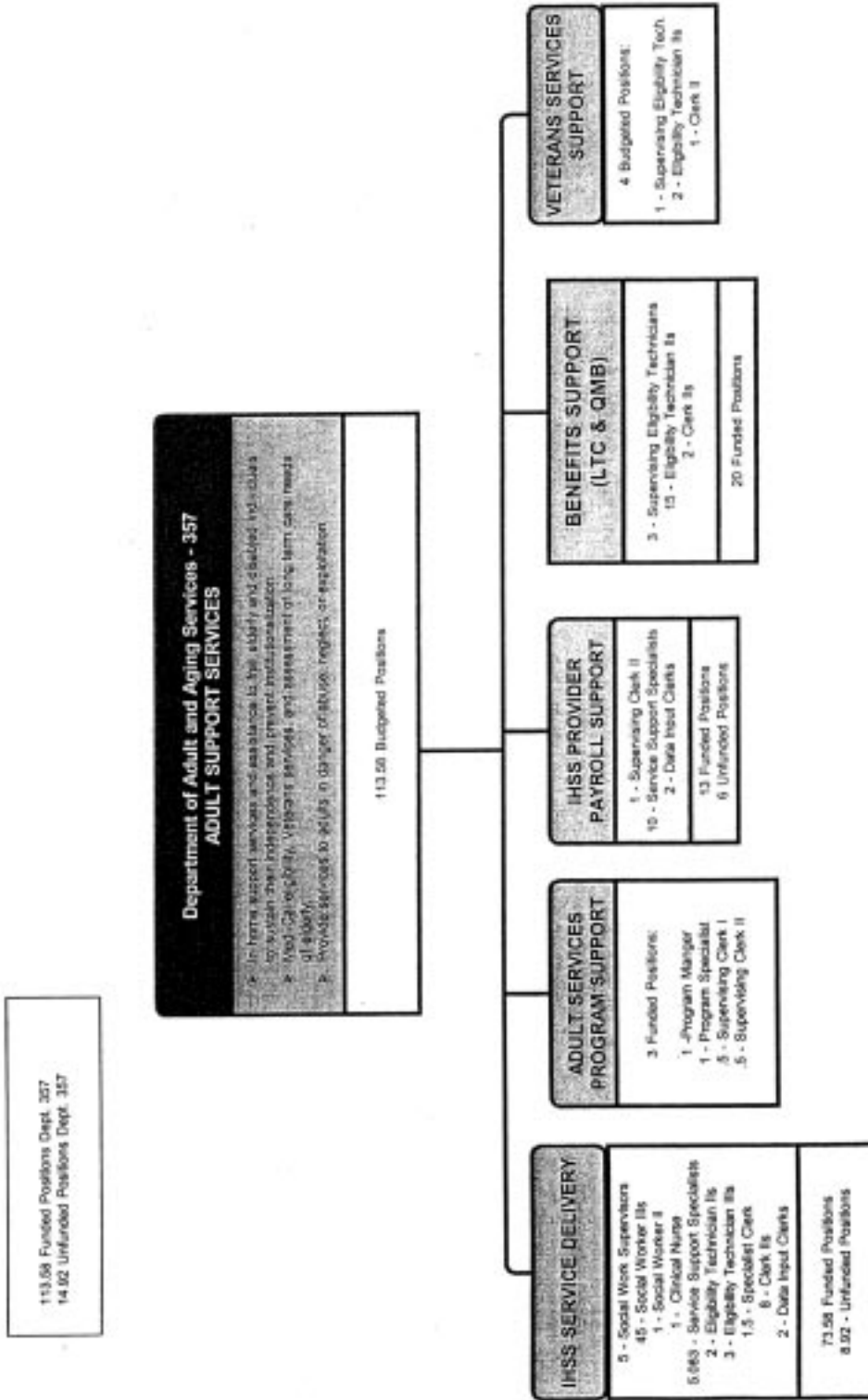
“Any actions should move us toward our vision.”

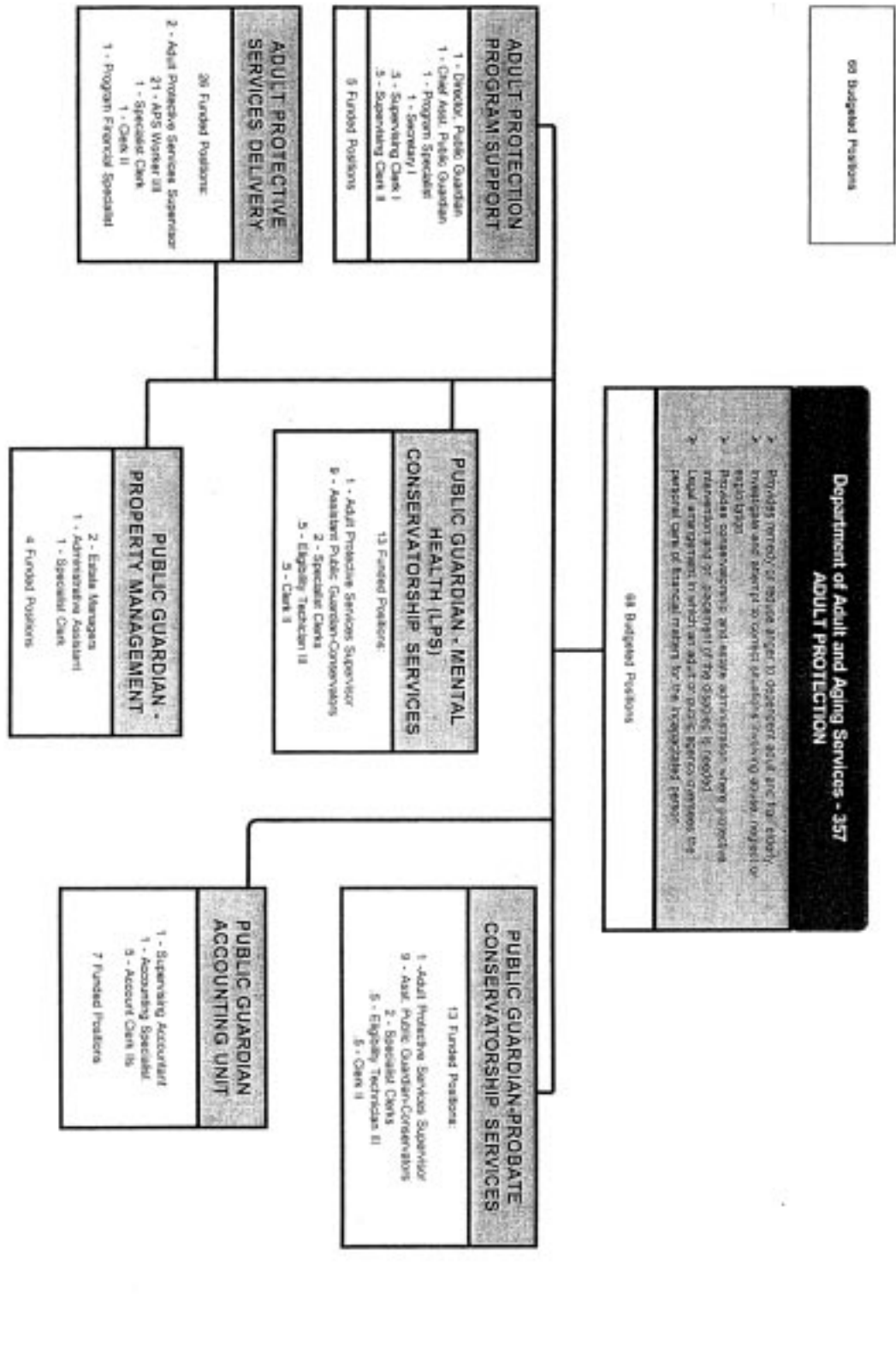
Heartfelt thanks to Linda Kretz and her staff for welcoming me and teaching me in the management style which embraces dedicated belief in cooperation of efforts for the benefit of adult and aging people.



FTE's By Budget Line	Funded/Unfunded
198.08	Total Funded Positions (357)
14.02	Unfunded Positions (357)
8.75	Total Funded Positions (359)
.25	Unfunded Positions (359)







SOCIAL SERVICES AGENCY 20-14