

The Benefits and Challenges of an Integrated Adult and Aging Division in the Sonoma County Human Services Department

SCOTT DANIELSON

EXECUTIVE SUMMARY

In 1992, Sonoma County undertook the reorganization of Aging and Adult Services as part of a planning process that involved a comprehensive restructuring of many county government programs. It was predicated on the Board of Supervisors' goal of reducing the cost of government and consolidating services with the idea that the newly created division would be the focal point for accessing services by the community. The end result was that the Sonoma County Adult and Aging Services Division achieved full integration in 1996 and now consists of the Area Agency on Aging, In Home Supportive Services (IHSS), Public Authority, Veterans Services, Adult Protective Services, Public Administrator, Public Guardian and Conservator.

Sonoma County's integration efforts resulted in a number of significant achievements, including:

- Sharing of resources among the different divisions
- Centralized Intake Unit for all Adult and Aging Services Programs
- Integration of MSSP/IHSS
- Personnel and staffing

- Program Operations
- Community Relations

Sonoma County also experienced challenges to its integration process, including:

- Employee uncertainty about job retention or assignments
- Organizational turf issues and resistance among the divisions/departments to be integrated
- Community support
- Organization disruption during integration process

My experience studying Sonoma County has raised questions of applicability to Contra Costa County. Contra Costa County achieved a similar type of reorganization without the painstaking research and deliberation that occurred in Sonoma. While Contra Costa County is now struggling to provide basic human services, its leaders have had to make very difficult decisions due to the economic downturn and deep recession. The economic situation the State of California finds itself in only exacerbates California's counties' problems.

Scott Danielson, Senior Staff Assistant,
Aging and Adult Services Bureau, Employment and
Human Services Department, Contra Costa County
Aging and Adult Services

The Benefits and Challenges of an Integrated Adult and Aging Division in the Sonoma County Human Services Department

SCOTT DANIELSON

Introduction

Human services programs are being particularly hard hit by funding reductions, forcing public agencies that deliver services to consider the cost effectiveness of integration while maintaining optimum services and benefits to clients and taxpayers. However, as funding streams are reduced, it becomes the responsibility of management and staff to develop means to maximize revenue sources and seek additional funding from not only traditional sources but non-traditional sources as well. The non-traditional sources of revenue generation require organizations to think outside the proverbial “box.”

In 1992 Sonoma County undertook the reorganization of Aging and Adult Services as part of a planning process that involved a comprehensive restructuring of many county government programs. This case study will chronicle those efforts.

When I choose this project for my BASSC Internship, the United States economy was experiencing a financial meltdown and the California state government was struggling with approving a state budget that was not only late but also had to address historically large budget deficits. Local governments were witnessing a massive housing equity collapse that reduced assessed valuations and the loss of tax revenue generated by property taxes. Correspondingly, Contra Costa County has eliminated vacant positions and laid off staff in order to balance its budget. Reductions in state funding for human service programs have hit the Contra Costa County Employment and Human Services Department very hard. With the Aging and Adult Services Bureau experiencing a loss of state funding and a reduction of county tax revenue, county administrators deemed it

necessary to make substantial cuts to the bureau in the following programs:

- The Adult Protection Services Division lost more than 50% of its staff causing workers to only be able to address the most critical cases;
- Caseloads for In Home Support Services (IHSS) social workers have almost tripled, reaching approximately 600 cases per worker;
- The Area Agency on Aging lost nearly half its staff;
- The Multipurpose Senior Service Program (MSSP) was given back to the State of California Department of Aging;
- The Linkages Program was contracted out to the community;
- The Conservatorship Program was transferred to the Health Services Department.

Additionally, the efforts of Contra Costa County’s work towards Long Term Care Integration was derailed by political issues and labor disputes at the state level. In response to this situation, I approached the writing of this paper in somewhat of a quandary. What is the impact of service integration when human service programs that address the needs of an increasing aging population are being dismantled? How does service integration affect or address this situation?

In the late 1990s, Contra Costa County began the task of bringing the adult social service programs under joint management with the Area Agency on Aging programs. Eventually, the Aging and Adult Services Division was transformed into a bureau that integrated the Area Agency on Aging, In Home Supportive Services (IHSS), Adult Protective Services (APS), Conservatorship, Multipurpose Senior Ser-

vices (MSSP) and Linkages programs. Different divisions were merged but it was not integration in the true sense of the word.

Sonoma County's integration efforts resulted in a number of significant achievements. Sonoma County implemented a broad spectrum of support for individual providers of IHSS. As part of the reorganization, its provider support unit was moved from the Public Health Division of the Health Department into the Adult and Aging Services Division. This addressed many shortcomings existing in many county independent provider programs, which do not give adequate support to vulnerable elderly and disabled clients who are unable to perform the employer functions for the in home care providers they hire for themselves. Sonoma's reorganization efforts established a centralized intake system for all of the Adult and Aging Services programs.

The inclusion of community representatives was important to the planning process involved in the reorganization of the Sonoma County Human Services Department. The end result was that the Sonoma County Adult and Aging Services Division achieved full integration in 1996 and now consists of the Area Agency on Aging, IHSS, Public Authority, Veterans Services, APS and Public Administrator, Public Guardian and Conservator.

Efficiencies were created by the sharing of resources thus achieving an economy of scale. All MSSP clients are IHSS clients. Caseloads are 260 per social worker. MSSP clients are seen four times a year. One visit is counted as an IHSS visit. All MSSP caseloads are pulled and put under one caseworker. The continuity of leadership is the commitment to leverage staff resources. IHSS still does the renewals, but a MSSP social worker does the initial visit and was part of the IHSS redesign. The idea behind this is that MSSP caseload workers know the clients better. The IHSS caseworker collaborates with the MSSP social worker to discuss cases.

During meetings with Sonoma County Adult and Aging Services staff, I was interested in how staff perceived the integration and if there had been any resistance to the process. The breadth and depth of

staff and community participation in the integration process was remarkable; however, I was told that the reorganization had taken a difficult toll among many of the supervisory and middle management staff. Some of the supervisors and managers seemed to lose sight along the way of the positive accomplishments achieved by the reorganization due to the long period of uncertainty they faced in regards to their future assignments. Because the county engaged in a fair and open competitive process for choosing staff for the redesigned management positions, some staff suffered from lengthy periods of anxiety about job security or job assignment. It is a difficult process to achieve organizational change and at the same time minimize the disruption to staff going through the process. Despite the disruption to the professional lives of many of the staff involved in the integration and reorganization, Sonoma County experienced significant achievements in the areas of personnel and staffing, program operations and community relations.

The inclusion of community representatives was an important element of the reorganization effort. Members of a Community Review Committee represented a cross-section of community based organizations as well as representatives of various human services advisory programs. The Advisory Council on Aging had concerns during the process about the need to maintain the independent decision-making power of the Area Agency on Aging in relation to its planning, advocacy and program contracting responsibilities.

Sonoma County is a medium-sized county experiencing increasing social service caseloads. It has been a goal of the Human Services Director to educate the community about what the county does and how the integrated Adult and Aging Services Division created efficiencies. Due to the downturn in the economy, more people are living in a crisis mode. The county is faced with overmatch reductions and a tightening of discretionary funding.

As in Sonoma County, the recession has sparked a rising demand for county social services in Contra Costa County as well. There are many persons and

families turning to the county for help that have never used social services before. The long-term disinvestment by the state of nearly \$2 billion annually has crippled the ability of counties to meet the rising need for safety-net services. The increasing number of applications coupled with chronic under funding by the state is leading to delays in the ability of people to receive help.

Contra Costa and Sonoma Counties have experienced a surge in applications for basic assistance: Food Stamps, CalWORKS, General Assistance and Medi-Cal. The recession has forced many working families to apply for government help who have never done so before. Some have assets and income higher than the maximum eligibility limits, resulting in a greater percentage of applications being denied than previously. These families may return in a few months in greater need once they spend down those resources. The "New Poor" in Contra Costa County can be a single mother with three children who lost her job and was evicted from her home. It could be a father who worked in construction and was laid off and falling behind on the mortgage and lost his home. There is hope that the American Recovery and Reinvestment Act (ARRA) will temporarily increase the federal matching rate for a number of programs. Most will primarily benefit the state; a few will result in increases for the county, primarily Head Start, Training and Employment Services, and a reduced county cost for IHSS.

Contra Costa County's Administrative Officer sees the downturn in the economy and the reduction of property values and the concurrent reduction of tax revenue as an opportunity that has been afforded the county to change how the county provides services. Administration believes a flattening out of the county's organizational structure can provide the county with the ability to cut costs and operate more efficiently. How this will be achieved in Contra Costa County is yet to be determined.

Conclusion

It has been my experience during lean economic times that government casts an eye towards the "ben-

efits" of privatization of public services. At the same time, corporations begin salivating at the chance of dipping into the public trough while lobbying to convince the taxpayers and their elected representatives that the private sector can manage a service or program cheaper and more efficiently than government. This may be true for running a jail or prison, or delivering food services or providing custodial services. It might even be true for Public Works departments, even the sheriff and police departments could be staffed with private security contractors. At least the taxpayers wouldn't have to pay 3% at 50 retirement benefits for its safety personnel. That indeed would result in substantial savings.

County Supervisors and administrators must keep in mind, however, that the services government provides are not intended to be profit oriented. Many of the services provided, such as social and human services, cannot be viewed in terms of a bottom line such as the way a for-profit corporation analyzes its service or product delivery. There has always been a chasm between the private for-profit and non-profit and governmental worlds. The private sector has boasted that it is more efficient and better managed. I believe the events of the last year prove otherwise.

The integration of the Adult and Aging Services Division in Sonoma County was predicated on the Board of Supervisors' goal of reducing the cost of government and consolidating services with the idea that the newly created division would be the focal point for accessing services by the community. The immediate cost savings experienced by the county was the reduction in the number of department heads and managers needed to run the newly integrated division. The long term-savings have been realized by consolidating all operations into one office, sharing staff resources and reducing administrative and management duplication.

Local government faces many challenges in these difficult times. My experience studying Sonoma County has raised questions of applicability to Contra Costa County. Contra Costa County achieved a similar type of reorganization practically overnight without the painstaking research and deliberation

that occurred in Sonoma. While Contra Costa County is now struggling to provide basic human services, its leaders have had to make very difficult decisions. Sometimes those decisions have been a choice between what is bad and what is even worse. It is a no-win situation. The Contra Costa County Employment and Human Services Department is in a hunkered down phase trying to meet the increased demand for its services. As history illustrates, recessions are cyclical events. In time the economy will recover and the slow and steady rise in inflation will drive the price of housing up and stocks will recover. More money will find its way into government social welfare programs. After this period becomes a historical footnote, let us hope we will have learned something.

Acknowledgments

I would like to thank Diane Kaljian, Director of the Adult and Aging Division of the Sonoma County Human Services Department for her time, assistance and guidance in orienting me to her department and explaining the integration process. My thanks to Gary Fontenot, Section Manager of the Adult and Aging Division of the Sonoma County Human Services Department. for his time, patience and wit. My additional thanks to Sonoma County staff who shared their insight into the integration process and included me in their staff celebrations.