

Service Delivery Programs

Housekeeping Program Guide

A housekeeping program may provide routine housekeeping, heavy chore service, and assistance with laundry. The purpose of these services is to assist residents to maintain a safe and clean apartment when ability to carry out these activities is restricted by illness or disability.

1. Key Elements

a. **Availability of Service**

The service is available to all residents requesting assistance on a “first-come, first-served” basis. If the demand for service exceeds what can be delivered, priorities for service may be set by management.

b. **Co-payments**

Residents make co-payments toward the cost of the service. The hourly amount charged may be set on a sliding scale based on income or it may be a set rate, such as three dollars per hour. Charging a uniform rate for everyone simplifies the record keeping. The co-pay amount should be set low enough to prevent cost from being a barrier to participation.

c. **Scheduling**

Some sites require residents to submit a service request form while others will accept telephone requests and complete the form for the resident. The telephone option may facilitate handling the request and confirming the schedule with one transaction. Requiring residents to provide a twenty-four hour notice of cancellation or pay for one hour of service helps keep everyone on schedule. Management can make exceptions for medical emergencies. Requests for service should be made by Thursday of the preceding week.

d. **Supervision**

The housekeeping aide is supervised and scheduled by one person, usually the manager. However, sites that have a service coordinator frequently assign these responsibilities to that person. The resident is required to be present during the cleaning and the resident signs the request form verifying the total hours worked.

e. **Billing**

Management bills for the service and collects resident payments. Payments are separate from rent and checks are made out to the site. If cash payments are permitted, it is important to provide a receipt to the resident. Usually, an invoice is sent at the end of the month, and payment is required at the same time rent is due. However, some managers and residents prefer to bill and pay immediately following delivery of each scheduled service. A policy should be adopted that prohibits giving payments or tips to the aide.

2. Staffing

The position may be held by a full or part-time housekeeping aide, by expanding hours for a janitorial employee, or by contracting for services with an agency. If the worker is an employee, then a single person provides the service and this person comes under direct management supervision and will fall under the company's insurance coverage for various forms of liability. Contracting with a worker may initially provide some flexibility but hourly costs are usually much higher, supervision is less direct, and insurance coverage must be monitored.

The recruitment process is easier with the help of those in the community to find and refer qualified applicants. It can also give everyone involved a better understanding of the service and provide an opportunity to answer questions. For example, other service providers need to understand that this is only a supplemental resource which does not replace services a resident may be entitled to or is currently receiving. Housekeeping workers may be recruited by:

- Contacting religious organizations for referrals.
- Inviting residents' cleaning persons to a meeting where job applications are available.
- Asking social service staff from the Area Agency on Aging for referrals.
- Holding a resident meeting and asking for referrals.
- Advertising in community newspapers.

3. Setting up the Budget

The following is a sample budget based on the expenses of existing programs. Program costs vary depending on the wage rate for a specific community and other cost factors determined by you, such as whether or not to provide cleaning supplies and your projected levels of service.

Housekeeper Wages (\$8.00/hr x 20 hrs/wk)	\$8,320.00
Housekeeper Medical Benefits	1,187.68
Workman's Compensation	882.75
Payroll Tax and Unemployment Compensation	97.34
Cleaning Supplies (estimate)	250.00
Less: Resident Co-Payment (\$3.00/hr x 19 hrs/wk)	<u>(2,964.00)</u>
Total Cost to Development	\$7,773.77

An additional expense for cleaning equipment may need to be included in the start-up budget. It may include the purchase of a cart to hold equipment and supplies in addition to purchasing such items as a vacuum and mops. Some programs require the resident to provide supplies and equipment; others prefer the efficiency gained by supplying them.

4. Getting Started

When the program is initiated, it is useful to review and discuss the new service at a resident meeting. This will provide an opportunity to answer questions and educate the residents about the purpose of the service.

The first time the service is used a Resident Statement of Understanding form is reviewed and signed by the resident. It outlines the program's policies and procedures. The form is a useful tool for developing resident understanding and can be distributed at this meeting. Samples of the Resident Statement of Understanding, Request for Services, Resident Services Invoice, and Resident Evaluation of Services provided at the end of the chapter may be of help in starting your program.

Escort/Shopping Aide Program Guide

The Escort/Shopping Aide Program is intended to assist residents who are too frail or ill to manage medical appointments alone or who are otherwise unable to obtain essential supplies and medications without assistance. These are frequently transitional services that fill a temporary need and provide the support that will enable a resident to remain at home.

1. Key Elements

a. Availability of Service

Residents' use of this program may be limited to those who are unable to manage these tasks by themselves and who need this supplemental assistance to keep medical appointments and/or to fill basic shopping needs.

b. Shopping Service

Shopping is done "for" rather than "with" the resident. Usually, when shopping is done for residents, a list is prepared of what is needed for each resident and the aide shops for several residents at the same time.

c. Escort Service

When providing escort to medical appointments, usually the aide takes the resident into the medical office but does not stay. The resident calls and the aide returns when the appointment is completed.

d. Co-Payment

Residents make a co-payment, such as three dollars per hour, with a minimum charge of one hour for the service. Some programs find it is more efficient to set a flat rate for the cost of specific services, rather than an hourly rate, such as one or two dollars for shopping when it is done for several residents at one time.

e. Scheduling

Shopping assistance is usually provided at a designated time each week. Shopping requests should be made by Friday of the preceding week to facilitate smooth scheduling. The nature of the escort service requires some flexibility in scheduling.

f. Transportation

Whether a site-owned van is used or the aide's own car, adequate insurance, a valid driver's license, and current vehicle inspection must be in place.

g. Procedures for Handling Cash

Care must be taken when handling other's money. A system of receipts, separate charges and envelopes will help keep accounts in order. The steps below outline this type of systematic approach:

- Give the resident a receipt for the cash provided.
- Put cash in a separate envelope with the resident's name.
- Pay for purchases separately from each envelope.
- Obtain receipts and the correct change for each purchase.
- Put receipts and change in the envelope when received.
- Calculate and note the balance on the envelope. Give to resident.
- Have the resident sign and return the receipt to verify receipt of correct change.
- Set a maximum cash limit for errands, such as \$50.

h. Billing

Management collects the resident co-pay, separate from rent. Usually, an invoice is sent at the end of the month and payment is due when rent is due. However, some programs prefer to bill and require payment immediately following delivery of the service. Checks should be made out to the site. If cash payments are permitted, it is important to provide a receipt to the resident. A policy should be in place that prohibits giving payments or tips to the aide.

2. Staffing

The limited nature and periodic scheduling of the service usually does not justify adding staff for this program alone. Usually, the Escort/Shopping Aide service is coupled with a cleaning services program and one resident aide is employed who is able to carry out all of these responsibilities. The same person generally handles supervision of both programs.

3. Setting up the Budget

As indicated previously, this service is usually added to the responsibilities of a current employee or is coupled with a new Cleaning Services Program. Mileage and any additional insurance costs are the only items that must be totally covered by this budget.

The program budget will be based on an estimate for the number of hours per week needed for the program. Although demand for this service varies with resident health status, the resident survey may provide a guide to estimate its use.

The budget should include the following expenses with specific amounts being prorated based on the number of hours projected for service delivery:

- Escort/Shopping Aide Wages (wage rate X service hours per week)
- Medical Benefits
- Workman's Compensation
- Payroll Tax and Unemployment Compensation
- Mileage Reimbursement and Added Insurance Costs

Subtract the amount of the resident co-payment to determine the total cost to the development.

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Meal Program Guide

Good nutrition, particularly when combined with socialization, promotes a healthy and active lifestyle. It is vital for the well being of older persons. Many studies have documented that older persons who live alone frequently slip into poor eating habits that put them at risk. Meal programs are designed to overcome this problem by providing a nutritious meal in a social setting.

1. Title III Meal Programs

Some senior housing communities are designated as congregate or group meal sites and receive federal funds to operate a meal program through the federal Title III program. The local Area Agency on Aging oversees the contracts for this program, which is designed to provide at least one nutritionally balanced meal, five days a week, at designated group meal sites.

Participation in the program is open to seniors in the community who sign up in advance for each meal. Costs are subsidized by Title III and seniors make voluntary contributions for each meal. Nutrition education is also part of the program and varied educational programs are scheduled on a periodic basis at the meal site.

This program is well established in many communities. Currently, funds for the program are limited, but in some areas the AAA may wish to establish new sites. However, the best opportunity to provide a meal program at your site may be through a partnership with an existing Title III program in your area.

2. Partnerships

Partnerships can be established between existing Title III meal services and senior housing sites that want to initiate a meal program for their residents. The Area Agency on Aging office will have contact information on existing Title III programs in your community. A satellite food service program may be initiated for a specified number of meals for one or two days each week. A resident survey can help you determine how many residents will participate. It will also show how often and when they would like the service.

If a Title III linkage is not available in your area, other options for delivered meals may exist. For example, it might be possible to link up with a hospital's food service program. One key difference with using other options is that residents would need to pay for meals instead of making a voluntary contribution, as mandated under Title III. In many areas, the cost of a prepared meal ranges from \$2.50 to \$3.50 and residents may be willing to pay that amount.

3. Keep It Safe and Sanitary

All food service programs must comply with sanitation, health and food handling requirements. For example, food temperatures of both hot and cold foods must be monitored and serving sizes must be based on nutrition standards. A contract with a Title III program will require that the meals be handled and served according to the program's regulations.

These various standards will require you to use specific types of equipment, such as steam tables, cold tables, and "sized" serving utensils. Title III programs will include periodic inspections to monitor compliance with regulations. While these regulations may seem overwhelming, the program runs effectively with trained resident volunteers and requires minimal staff time once it is established.

4. From Delivery Truck to Table

Resident volunteers are a crucial component of an effective and efficient meal program. Volunteers may be recruited and trained to carry out the following tasks:

- Prepare the steam and cold tables prior to delivery of the meals.
- Verify the number of meals delivered, check food temperatures, and complete the required logs and forms.
- Prepare coffee and tea; set up cups and stirrers.
- Set up individual servings of dessert and bread; maintain supply during meal service.
- Serve entrees, following specified serving amounts.
- Provide individual table service to those with mobility impairments.
- Handle paper work for checking in and signing up residents; count the donations.
- Clean serving trays, pans, and utensils according to regulations.

All of these tasks can be carried out by six or seven volunteers each contributing approximately three hours of service. Separate volunteer crews may be organized for different days if service is provided several days each week. Volunteers usually enjoy being given responsibility for specific tasks rather than rotating assignments. Each one takes pride in being associated with an important and specific role in carrying out the program.

5. Pulling the Program Together

An effective meal program needs staff with strong organizational and motivational skills to coordinate volunteers, assure that regulations for food service are being observed, and handle required record keeping and reports. Additional tasks include purchasing supplies, ordering meals, and organizing educational programs on nutrition. To build resident participation, staff promotes interest by preparing advance menus that are distributed in the building. While these tasks are varied and numerous, they are not time consuming once the system is set up and the regulations are understood.

In addition to start-up expenses for new equipment, the program's costs are primarily allocated to personnel expenses. These will include approximately 8 hours per week for administrative responsibilities and 6 hours per week of custodial time for maintenance of the serving area.

For a program with a Title III meal delivery contract, the site will also have an expense based on the amount negotiated to cover this service. For other food service options, resident payments for meals are required and these can cover the contract expense.

To sum up, a significant commitment of time and effort may be needed to get underway but the results can provide big dividends – a healthier and happier life for your residents.

Transportation Program Guide

A transportation program will enable residents to maintain an active lifestyle. A van service enables residents to accomplish their essential trips like shopping and medical appointments and to participate in varied social activities. Transportation makes a vital contribution to the dignity and well being of the residents and is a valuable marketing tool for any apartment complex.

1. Policies for Resident Transportation Services

Decisions on “when and how” the van will be used are key considerations for setting up an effective program. While management is responsible for these decisions, they should not be made without significant input from residents. Together, management and residents should establish reasonable policies that address the following areas:

- Hours for transportation services
- Rules for resident use
- Limits on distance or area served
- Methods for scheduling trips
- Arrangements for medical requests
- Safety requirements

An established weekly or monthly schedule may be set for frequent trips, such as to senior centers, grocery stores, and malls. A specific day of the week may be set aside for scheduling individual trips for medical services. Time may also be set aside for other types of specific requests. Some sites in rural areas set up times for a “shuttle service” that makes a scheduled “loop” through the community's business section to drop off and pick up residents.

This must be established as a free service. Requiring resident payments or contributions for transportation violate state laws regulating public transportation.

2. Coordinating the Service

It is useful to hold a resident meeting to launch the transportation program and give each resident a copy of the site's Van Regulations. Management can answer questions on the regulations and explain how the service will be coordinated. A frequently used approach for coordinating the service is outlined below.

Each month a calendar showing all of the scheduled or planned trips is set up. The calendar includes departure and return times for each trip. Individual copies are made available for the residents. Scheduled trips are coordinated on a “first-come, first-served” basis, with residents signing up for the trips they wish to make. Sign-up sheets are posted in a specific area that is highly visible, such as near the elevators in the lobby.

The van driver may be given the responsibility for coordinating specific resident requests that are not part of the regular schedule. A specific time for residents to make this type of arrangement with the driver can be established. While policy may require that specific requests serve a certain number of residents, such as four or more, some sites schedule a few days for accommodating individual requests. Special consideration may be given for the individual needs of residents using wheelchairs. Management may want to review and give final approval to these types of specific requests.

3. Deciding on Personnel and Equipment Needs

A site’s choice of van size and who drives it may vary substantially. Most decide to employ a van driver, either on a full-time or part-time basis. Shared costs and services of a van and driver may allow sites with limited budgets to provide transportation to residents.

Analysis of your residents’ needs for services, combined with personnel resources, and the overall cost considerations will shape these decisions. Smaller sites may have ten-passenger vans while larger sites may have fifteen or twenty-passenger vans. Regardless of the size of van, wheelchair access is a must.

4. Qualifying for the Driving Job

Your choice of van size will determine the license and skill requirements for your van driver. The requirement for a different license class is determined by the weight of the vehicle. Usually, a van for fifteen or more passengers, including the driver, will require a commercial license. Sites needing the larger van frequently employ a specific person to handle both the driving and the maintenance responsibilities for the van.

Interpersonal skills of the driver are nearly as important as his or her driving skill.

5. Setting up the Budget

The initial budget will include both annual expenses and the cost of the van. Some sites initiate the program with a lease/purchase arrangement for the van to eliminate such a large start-up investment. In addition to the cost of purchasing or leasing the van, programs may have the following annual expenses:

- Driver’s salary or wages and workman’s compensation costs
- Medical and/or retirement benefits
- Vehicle insurance
- Gasoline, maintenance, inspections, and license
- Cellular phone service
- Driver uniforms (optional)

6. Pulling the Program Together

The following forms could be helpful in organizing the service as you get under way:

- Resident Sign-up Sheet
- Passenger Log
- Gasoline/Mileage Log
- Maintenance Service Log

Samples

Housekeeping Program

Resident Statement of Understanding
Request for Services
Resident Services Invoice
Resident Evaluation of Services

Escort/Shopping Aide Program

Resident Statement of Understanding