



METROPOLITAN
AREA AGENCY
on A·G·I·N·G

2008 Chore Supportive Services

Operations Manual

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I. Metropolitan Area Agency on Aging

In 1965 President Lyndon B. Johnson signed the Older Americans Act into law. Arguably the most comprehensive legislation affecting older Americans, the Act enacted broad funding for a local infrastructure of senior services through government entities and service providers.

In 1972 the Metropolitan Council was designated by the Minnesota Board on Aging as the area agency on aging for the seven county region. The Met Council served as governing board and an Advisory Committee was appointed to make policy and funding recommendations.

During the 1970's the Area Agency on Aging's work focused on planning and funding a system of services under the Older Americans Act through three year grant awards that fell under very broad priorities.

The 1980's saw the development of formal "Service Delivery Plans" for each county. Through this process more specific Older Americans Act funding priorities were developed. Funding roles of counties, the United Way and the Area Agency on Aging were also defined. In 1986 a commitment was made to fund services for minority elders and hence the first Special Access projects were funded.

In 1994, under the Carlson Administration, the Met Council was directed to focus on its core roles and divest of regional planning and other functions that were not a close fit. At this time the Minnesota Board on Aging completed a process to designate an organization as the area agency on aging, a non-profit organization – Metropolitan Area Agency on Aging (MAAA).

The Minnesota Board on Aging required area agencies on aging to provide the Senior LinkAge Line™ information and assistance program in 1996. This resulted in the establishment of a call center staffed by information and assistance specialists on site.

Congress and President Clinton reauthorized the Older Americans Act in 2000 and included the National Family Caregiver Support Program (NFCSP). NFCSP was designed to support individuals caring for older adults and grandparents raising grandchildren. MAAA and its community partners have strengthened and expanded services for caregivers via funding from this new title of the Older Americans Act.

In 2004 the Metropolitan Area Agency on Aging celebrated its decade anniversary.

The Metropolitan Area Agency on Aging has been designated by the Minnesota Board on Aging to administer Older Americans Act funds in the Twin Cities Metropolitan Area. In partnership with public and private organizations, the Metropolitan Area Agency on Aging, helps seniors age successfully by building community capacity, advocating for aging issues, maximizing service effectiveness and linking people with information. More information on MAAA can be found at www.tcaging.org.

The Metropolitan Area Agency on Aging awards Older Americans Act and State of Minnesota funds for the development of new services and / or the continuation or expansion of existing services. Proposals are evaluated in accordance with MAAA's plan for a coordinated and comprehensive system of services for older people and their caregivers.

The MAAA has included chore supportive services in its funding priorities since the early 1980's, recognizing that assistance with chore, indoor housekeeping, minor home repair and lawn and snow work are instrumental in helping seniors live independently in their communities. In the 1980's, with the goal of increasing access to and availability of chore services within Anoka, Hennepin and Ramsey counties, MAAA began funding chore projects under a "coordination model."

In 2005 MAAA staff developed recommendations for a new model of chore delivery to be implemented in 2006. Based on data available from chore supportive service providers, the State of Minnesota, metropolitan counties and research it was determined that MAAA would develop a chore supportive service network. Funding was awarded directly to providers for chore services on a competitive bid process.

In 2009 MAAA will release a competitive Request for Proposals for chore services.

II. Funding

A total of \$490,756 in Older Americans Act Title III-B funds was made available in 2007 to support programs serving older adults age 60 and older in Anoka, Carver, Dakota, Hennepin, Ramsey, Scott and Washington counties.

Chore service funding has followed the relatively static levels of the Older Americans Act. The decrease in 1992 was a result of MAAA utilizing carry-over dollars to sustain previous allocation levels despite reductions in federal dollars. The reduction in 1996 was the result of a 6.5 percent reduction in federal allocations. The increase in 2002 was the result of an increase in the federal allocation. The reduction in 2005 was the result of a reduction in federal allocations.

Chore Funding Levels

Year	Funding Level
1991	\$425,090
1992-1994	\$425,090
1995	\$425,100
1996-2001	\$397,470
2002-2003	\$438,765

2004	\$438,765
2005	\$421,325
2006	\$451,311
2007	\$487,506
2008	\$486,008

The estimated average federal cost per unit for chore supportive services in quarter 1 of 2007 for agencies with a fifty (50) percent match requirement was \$8.18. The estimated federal funds granted to chore supportive services in 2007 for agencies was \$34,715.

Older Americans Act, Section 344, states that funds may not be used to supplant or replace other sources of funds (maintenance of effort). This means that existing services similar to those proposed in the Older Americans Act application must be maintained through other sources of funds.

Chore service projects should make the best use of existing resources: incorporating the "informal network" into the service design, using volunteers and other available local resources as appropriate; leveraging local support from local municipalities, foundations, school districts, civic groups, fundraising, etc. to increase funds available and create stronger local ownership of the programs; coordinating and complementing the existing formal service network - public, non-profit and for-profit.

MAAA encourages providers to secure contracts with counties to become long-term care waiver providers for reimbursement through the Elderly Waiver Program and Alternative Care Grant.

The Elderly Waiver (EW) program funds home and community-based services for people age 65 and older who are eligible for Medical Assistance (MA) and require the level of medical care provided in a nursing home, but choose to reside in the community. The Minnesota Department of Human Services (DHS) operates the EW program under a federal waiver to Minnesota's Medicaid State Plan. Health plans administer the program.

The Alternative Care (AC) Program is a state-funded cost-sharing program that supports certain home and community-based services for eligible Minnesotans, age 65 and over. This program provides home and community-based services to prevent and delay transitions to nursing facility level of care. The program prevents the impoverishment of eligible seniors and shares the cost of care through an expanded client role by maximizing use of their own resources. It is administered by counties.

In addition MAAA supports chore providers in accessing Community Services/Community Services Development (CS/SD) Grants. In the 2001/2002 sessions, the Minnesota Legislature appropriated approximately \$8.5 million to the Department of Human Services (DHS) to assist communities in rebalancing their long-

term care service delivery system. The (CS/SD) Grants are intended to expand the infrastructure for services and housing options.

More information on long-term care waiver programs and CS/SD Grants can be obtained from www.dhs.state.mn.us.

III. Target Population

Targeting standards set by MAAA require special efforts be made to reach the following older adults who:

- Have greatest economic need and social need;
- Are part of a minority ethnic or racial group (services must be provided to minority older adults in at least the same proportion as they are to the older population of the service area);
- Are frail, have a disability or functional impairment;
- Reside in rural communities or are isolated;
- Have limited English proficiency; or
- Have a hearing or visual impairment.

Providers will work with MAAA staff to electronically collect and report the necessary data to identify persons that are below 100% of poverty income and below 200% of poverty level.

IV. Program Outcomes

The expected two outcomes for chore projects are:

- The service provided meets the needs of clients, supporting them to live independently. In response to an annual survey, in the first year 85% of clients reporting will indicate that the service provided improved their ability to live in their homes.
- Chore service projects will be perceived as a quality service. Of those who respond to an annual survey, in the first year 85% will indicate that they feel they: had a call returned to them within 24 hours (1 business day), spoke with someone who was courteous, received information that was clear and understandable and received service that was prompt and satisfactory.

The chore projects will choose one outcome annually to report on lessons learned or program service changes as a result of their program outcomes. The chore project will provide any explanation for a variance between benchmarks proposed and actual results and provide specific changes to be made in program design, or service delivery to clients or chore service projects as a result of lessons learned.

V. Reporting Requirements

Projects agree to the following reporting requirements:

1. Services Activity Report – Due the 10th of the month following each quarter. If the due date falls on a weekend or holiday, the report is due the business day closest to the 10th of the month.

No revised reports will be accepted. If it becomes necessary to correct an error on a report, it should be reported and reflected as an adjustment in the following quarterly report.

The Service Activity Report must be submitted as an attachment electronically to vmaccallum@tcaging.org.

2. Financial Report – Due the 10th of the month following each quarter. If the due date falls on a weekend or holiday, the report is due the business day closest to the 10th of the month.

No revised reports will be accepted. If it becomes necessary to correct an error on a report, it should be reported and reflected as an adjustment in the following quarterly report.

The Financial Report must be submitted electronically to vmaccallum@tcaging.org.

An original signature is only required on the fourth (final) quarterly report.

If changes occur to the fourth quarter report, grantees may submit a revised fourth quarter financial report before February 10th of the year following the end of the grant reflecting changes.

3. National Aging Program Information System (NAPIS) Report – Electronically submit monthly for client registration, number of persons served, number of units of services by persons and when implemented financial information. The export is due the business day closest to the 10th of the month. Data should be submitted to techcoord@tcaging.org and cc'ed to vmaccallum@tcaging.org.

Providers must make a good effort to update NAPIS data annually. NAPIS, as with all forms must be kept for a minimum of five (5) years.

4. Progress Narrative – Due the 10th of the month following each quarter. Submit an update on activities and should include activities reported in your application such as:
 - Changes in Program Operations / Administration
 - Client Satisfaction – Surveys and Evaluations
 - Employee and Volunteer Education/Training/Conferences
 - Outreach and Collaborations
 - Outcomes and Quality Improvement
 - Examples of Promotional and Outreach Materials
 - Example of Service Projects and Special Projects Activities

The progress narrative may be submitted electronically to vmaccallum@tcaging.org.

All materials and information submitted become the property of the MAAA, and the reports of the selected applicants will be considered public information, unless specific sections are labeled as proprietary and a bona fide proprietary reason exists for the protection of that specific information.

VI. Civil Rights & Grievance Policies

Providers are required to have a posted civil rights policy and complaint resolution policy. Below are samples of policies available from the State.

Civil Rights Policy

The services, facilities and benefits of this program are for the use of all older people regardless of race, color, creed, religion, national origin, sex, disability, use of public assistance, or sexual orientation.

Any individual who feels he/she has been denied the opportunity to participate in this program and wishes to file a complaint of discrimination should write to the following office:

Executive Director
Minnesota Board on Aging
P.O. Box 64976
St. Paul, MN 55164-0976

Complaint Resolution Policy

It is the policy of this agency to provide service to all persons without regard to race, color, creed, religion, national origin, sex, disability, use of public assistance, or sexual orientation.

The same requirements are applied to all and there is no distinction in eligibility for or in the manner of providing services.

All persons and organizations having occasion either to refer persons for services or to recommend our services are advised to do so without regard to race, color, creed, religion, national origin, sex, disability, use of public assistance, or sexual orientation.

The person designed to coordinate with Section 504 of the Rehabilitation Act of 1973 is _____ and can be reached at _____.

VII. Assurances of Compliance & Certifications

The applicant agency understands and agrees that the assurances and certifications listed below are part of the application and are binding upon the applicant agency and the conduct of the project subsequent to the award of any funds by the Area Agency on Aging.

General Assurances

1. That the project will be carried out in accordance with Title III of the Older Americans Act, the program regulations issued thereto, the policies and procedures established by the Area Agency, and the terms and conditions of this application as approved by the Area Agency in making an award of funds.
2. That where subcontracts are proposed for the operating of one or more components of the proposal, and are approved as part of any award of funds under title, the applicant agency retains full and complete responsibility for the operation of the project in keeping with the policies and procedures established by the Area Agency for the project. The applicant agency will be held accountable by the Area Agency for all project expenditures; and will ensure that all expenditures incurred by the subcontracting agency(ies) will be in accordance with the cost policies and procedures established by the Area Agency, in keeping with the guidelines of the Administration on Aging. Copies of the proposed subcontracts are submitted with this application.
3. To cooperate with the Area Agency in its efforts toward developing a comprehensive and coordinated system of services for the elderly, by participating in joint planning efforts and other activities mutually agreed upon to meet this goal.
4. To provide for or participate in such training as may be necessary to enable paid and volunteer project personnel to perform more effectively.
5. To actively seek qualified older persons for paid positions on the project.
6. To make provisions where feasible for volunteer opportunities for older persons.
7. To cooperate and assist in efforts undertaken by the Area Agency, the Minnesota Board on Aging, the Administration on Aging, or any other agency or organization duly authorized by any of the preceding to evaluate the effectiveness, feasibility and costs of the project.
8. That no personal information obtained from an individual in conjunction with the project shall be disclosed in a form which identifies an individual without the written, and informed consent of the individual concerned.
9. To maintain such accounts and documents as will serve to permit determination at any time of the status of funds within the award, including the disposition of all monies received from the Area Agency, and the nature and amount of all charges claimed against such funds.
10. Agrees to keep such records and make reports in such form and containing such information as may be required by the Area Agency.
11. To comply with equal employment opportunity and affirmative action principles so that employment practices are based solely on the work related abilities and qualifications of employees and job applications. Staff are hired, assigned, and promoted without regard to race, color, religion, sex, age, handicap, or national origin.

Also, the applicant agency HEREBY CERTIFIES that the applicant agency has no commitments or obligations which are inconsistent with compliance of these and any other pertinent federal regulations and policies, and that any other agency, organization or party which participates in this project shall have no such commitments or obligations.

Other Certifications & Assurances

The following were all agreed to upon application and receipt of grant award as required

by the Federal and State Governments:

- Section 504 of the Rehabilitation Act of 1973
- Civil Rights
- Non-Construction Programs
- Lobbying
- Debarment
- Drug Free Workplace

VIII. Agreements

In addition to the conditions in this RFP and the assurances that are signed, grant recipient must agree to:

1. Notify staff and volunteers know that they are not allowed to solicit contributions (except program income), sell anything to clients, or encourage acceptance in a belief of philosophy by service participant.
2. Provide specific service information about all senior services of the organization and / or sub-grantees to the Minnesota Board on Aging online resource database, MinnesotaHelp.info.
3. Give visible recognition to MAAA and include on all materials made available to the public which are paid for with Older Americans Act Title III-B funds with the following phrase: "Funded by the Metropolitan Area Agency on Aging as part of the Older Americans Act." If Older Americans Act Title III-B funds paid for a portion of materials the following phrase may be substituted: "Funded in part by the Metropolitan Area Agency on Aging as part of the Older Americans Act."
4. Have a written policy for reference checks, annual reviews and criminal background checks.
5. Participate in an annual site visit.
6. Maintain records for at least five (5) years after the conclusion of the grant.
7. The project shall carry and maintain in effect for the duration of the contract, general liability insurance with a limit, at a minimum in aggregate of \$1 million, workers compensation, fidelity bonding insurance and other appropriate insurance. Depending on the nature of the service, this limit may be negotiable.
8. Maintain policies as required by the Standards for Chore Services such as background checks, reference checks and annual reviews for skills bank workers, paid staff and volunteers.

IX. Financial Review

If a Contracts/Grants Manager has concerns, upon completion of the on-site assessment or any other time deemed appropriate, he/she will immediately notify MAAA's Financial Officer and Accountant in writing (cc: Programs and Services Director) of specific issues and concerns and request that a Financial Review of the organization be scheduled.

A Financial Review includes an in-depth review and evaluation of an organization's financial management activities including documentation to support its accounting entries and program reports.

Upon written receipt of a financial review request, the MAAA Financial Staff will notify the Contracts/Grants Manager of scheduled appointment and provide, after their financial review is completed, a copy of their findings. MAAA's Finance Staff shall provide a written report, along with their findings, to the organization along with a corrective action plan – if determined to be appropriate, and MAAA's opinion as to whether the organization has significant risk factors, moderate risk factors, or lesser problems. The Financial Officer and Accountant will follow-up accordingly with the organization as deemed necessary/appropriate to ensure that all issues are addressed and corrected.

X. Budget Revisions & Information

Upon application for a grant a budget was submitted. This budget is the plan for how money granted from MAAA will be spent. In the event line item expenditures change a budget revision must be submitted.

Revisions that require MAAA Executive Committee approval:

- Change in amount of award or cost sharing ratio;
- Transfer of substantial service responsibility to another agency or program by means of contract or other agreement;
- Change in recipient of award.

Revisions that require Metropolitan Area Agency on Aging staff approval:

- Change in project scope or objectives;
- Change of composition of non-federal matching share from cash to third party and/or in-kind contributions or to increase the amount of in-kind contribution from that approved in budget;
- Transfer of approved budgeted amounts between indirect and direct cost categories;
- Transfer of approved budget amounts for training to other costs categories;
- Transfer of approved budgeted amounts to line items with \$0 cost indicated in the original budget;
- An increase of 20 percent or \$5,000, whichever is greater, in a single line item, total approved cost in each service category or the approved Net Cost (combined federal and non-federal matching funds), when the authorized federal award exceeds \$100,000 for a single grant period; or
- An increase of 10 percent of \$2,000, whichever is greater, if the federal award is less than \$100,000 for a single grant period;
- Award of carryover and audit resolution.

All revisions requiring Metropolitan Area Agency on Aging Executive Committee or staff approval must be submitted in writing to the appropriate program officer and be adequately detailed to justify the request. Requests must include a letter of explanation for the requested revision, summary budget change form and corresponding revised budget pages to the original proposal.

The last day to make budget adjustments is November 1st of the grant period.

In addition, if the person who has been designated to sign official documents on behalf of the project (e.g. Notification of Grant Award, financial reports, requests for payment) changes during the project period, program officers must be notified of this change in writing before the new designee's signature can be accepted.

XI. Standards for Chore Services

Section 1 - Standards for the Chore Coordinators

Section 2 - Standards for the Chore Workers

Section 3 - Service Definitions

Section 4 - General Provision

Section 1 - Standards for Chore Programs

Purpose of Chore Program Offices: To provide chore services to older Minnesotans in a specific geographic area or to older members of a particular special population through use of paid staff, volunteers, and / or skill bank workers. Older is defined by the Older Americans Act as individuals 60 years old or older.

Service Delivery: In general, client contacts chore office; chore coordinator collects basic client information, determines the nature of chores needed, and refers client to chore paid staff, volunteer, or skills bank chore worker for completion of necessary tasks. Providers must outline specific service delivery plans in application materials.

Quality Control: Distributed client evaluation survey to clients at least once annually; regular personal follow-up with clients upon job completion. Follow-up results and customer satisfaction survey results shall be reported in quarterly progress narrative reports.

Mandatory Reporting: Ensures that all clients receive National Aging Program Information Systems form (NAPIS); program electronically submits returned and completed NAPIS forms monthly to the Metropolitan Area Agency on Aging (MAAA) . NAPIS forms must be updated annually. Services cannot be denied to clients who do not submit NAPIS data. Other mandatory reporting requirements include a quarterly unit and financial report, yearly final financial report, quarterly progress narrative, and quarterly services activity report. In addition provider will participate in an annual site visit.

Data Collection: Provider must submit client records electronically to MAAA on a monthly basis. This data may be collected by MAAA's chore tracking program or another approved program. Records shall be maintained for at least five (5) years after the conclusion of the grant.

Client input: Ensure that older adults are involved in determining program direction through collation of client evaluations and surveys.

Outreach: Make contact with community representatives to publicize the availability of services to target populations. Any outreach materials developed using Older Americans Act Title III B funds should give visible recognition to MAAA and include the phrase “Funded by the Metropolitan Area Agency on Aging as part of the Older Americans Act.” If Older Americans Act funds paid for a portion of the materials the following may be substituted: “Funded in part by the Metropolitan Area Agency on Aging as part of the Older Americans Act.”

Program Income:

Providers must meet requirements as outlined by federal and state regulations regarding cost sharing, including:

- a) Not denying any service for which funds are received for an older adult due to the income of such individual or such individual’s failure to make a cost sharing payment;
- b) Protecting the privacy and confidentiality of each older adult with respect to the declaration or nondeclaration of individual income;
- c) Determining the eligibility of older adults to cost share solely by a confidential declaration of income and with no requirement for verification;
- d) Not considering assets, savings, or other property owned by old adults when defining low-income individuals who are exempt from cost sharing; and
- e) Notifying staff and volunteers that they are not allowed to solicit contributions (except for program income), sell anything to clients or encourage acceptance in a belief or philosophy.

Accessibility: Ensures that staff or volunteers are available to answer client phone calls.

Information & Referral: Refers client to other essential services as appropriate including appropriate referrals to the Senior LinkAge Line® and regular updating of the Minnesota Board on Aging’s online resource database, MinnesotaHelp.info as services or programs change.

Resource Management: Secures matching funds to ensure adequate financial support of client services; recruits regular and volunteer chore providers. Programs will strive to leverage additional resources beyond in-kind match including, but not limited to long-term care waiver programs (Elderly Waiver Program and Alternative Care Grant), foundation support, state funding, municipal funding, county funding and health insurance reimbursement.

Administration: Ensures provision of direct chore services through one or more of the following models. For all models, chore projects shall have a written policy for reference checks, annual reviews and criminal background checks.

1. Skills Bank

- a) Recruit workers and volunteers to register with the skills bank. Recruitment is done through churches, service clubs, schools, and neighborhood organizations.
- b) Screen workers - Each prospective worker submits an application with work related references. These references are checked and, if approved, the

- worker is listed in the skills bank according to skills, geographic area willing to serve, and volunteer or paid status.
- c) Orient workers to the project and the guidelines they are expected to follow. The chore workers are independent contractors and not employees of the project.
 - d) Screen client requests for service. If the request for a task is unclear, the program coordinator may make a home visit to determine whether the job is appropriate for a skills bank worker to perform and estimate how many hours would be necessary.
 - e) Match the clients with a worker. The Program Coordinator is a "broker" in matching screened workers with seniors needing help. Follow-up with both client and worker regarding satisfaction with the service is the responsibility of the Program Coordinator.
 - f) The workers submit time sheets to the project monthly, documenting service hours and requesting subsidy payment on behalf of low-income seniors who could not afford the full cost of service
 - g) Depending on the type of task, a slightly different approach may sometimes be used. For example, with snow shoveling and lawn mowing, an agreement is made between a youth and a senior to cover an entire season rather than going through the skills bank each time. For lawn raking or changing windows, a neighborhood organization may provide a one-time service for a few clients. The projects need to maintain this flexibility in order to make the best use of the resources in a particular neighborhood.

2. Paid Employees

- a) Hire and orient chore workers as agency employees.
- b) Receive referrals from clients or persons calling on behalf of clients and complete a phone intake.
- c) Assign and schedule employees to provide service.
- d) Follow-up on service provided, supervise employees, issue payroll and send contribution statements to clients receiving service.

3. Volunteers

- a) Recruit through churches, service clubs, schools, and neighborhood organizations.
- b) Screen volunteers - Each prospective volunteer submits an application with work related references. These references are checked and, if approved, the volunteer is listed according to skills and geographic area willing to serve.
- c) Orient volunteers to the project and the guidelines they are expected to follow.
- d) Screen client requests for service. If the request for a task is unclear, the program coordinator may make a home visit to determine whether the job is appropriate for a volunteer to perform and estimate how many hours would be necessary.
- e) Match the clients with a volunteer. Follow-up with both client and worker regarding satisfaction with the service is the responsibility of the Program Coordinator.

- f) The volunteers submit time sheets to the project monthly, documenting service hours and requesting subsidy payment on behalf of low-income seniors who could not afford the full cost of service
- g) When groups volunteer to provide services with several volunteers, the coordinator of the volunteers works directly with the Program Coordinator to negotiate tasks and level of commitment from Program Coordinator.

4. Private Vendors

From time to time, private vendors may be used for minor and emergency home repairs and to meet a demand for services that continues to exceed available resources. Private vendors will enter into contracts to provide chore workers to complete chores to standards determined by the Coordinator.

Section 2 - Standards for Chore Workers

Purpose of Chore Workers: To provide chore services to older adults in their homes so that the clients are able to live independently as long as possible. Chore workers are expected to complete chores to the following standards, bearing in mind that a number of factors may limit or otherwise influence the way any particular chore is performed.

Factors Influencing Chore Performance:

1. Chore services are provided to clients so that they can live as independently as possible as long as possible. For this reason, clients are encouraged to complete any portion of any chore that they are capable of. For example, a chore worker may mow the lawn, and the client may sweep up the clippings.
2. Clients may request that more detailed work be omitted by the chore worker to decrease the amount of time a chore worker spends performing chores, so that the cost to the client is limited. A client who only uses the front door during the winter months may ask that a chore worker only shovel the front walk to save time.
3. Each client has his or her own specifications of what a particular chore entails. One client may want grass and leaf clippings mulched, another may want them swept up. One client may want every item on a shelf dusted, another may wish to dust more delicate objects personally.

The above factors should be taken into consideration when evaluating the quality of a chore worker's performance.

Chore Performance Criteria

General Standards: If clients supply tools, workers are expected to store client-owned tools and supplies appropriately after the chores are completed, and to dispose of waste properly. If furniture, lawn ornaments, and the like are moved in the course of chore performance, they are to be put back in their original positions.

Section 3 – Service Definitions

Chore services must submit an annual narrative plan outlining service provisions. The following service definitions outline allowable activities covered by Older Americans Act chore supportive service funds.

1. Seasonal Outdoor Work (one-time jobs)
 - a) Gutter Cleaning: Leaves and other debris are removed from gutters, and bagged or mulched per client specifications. Bagged leaves are positioned appropriately for municipal pick-up or removed by the chore worker. Mulched organic materials are deposited in client's yard or garden per the client's specifications. Non-organic debris is placed in appropriate waste receptacle.
 - b) Leaf Raking: Leaves are removed from all areas of the client's yard and walks, and bagged or mulched per client's specifications. Bagged leaves are positioned appropriately for municipal pick-up or removed by the chore worker. Mulched organic materials are deposited in client's yard or garden per client's specifications. Non-organic debris is placed in appropriate waste receptacle.
 - c) Trim Shrubs: Shrubs are groomed to client specifications. Bagged clippings are positioned appropriately for municipal pick-up or removed by the chore worker. Mulched organic materials are deposited in client's yard or garden per the client's specifications.

2. Indoor Heavy Cleaning (one-time jobs)
 - a) Washing Walls: Walls are washed to client specifications.
 - b) Cleaning Basement/Garage: The area is cleaned to client specifications and in compliance with local ordinances. Waste is properly disposed of or positioned for municipal removal. Toxic waste, tires, and other materials that cannot be disposed of through municipal waste removal services, are transported to appropriate municipal disposal site. Programs should take all necessary precautions to minimize potential risk to chore workers. Providing basement and garage cleaning services are at the discretion of programs. Where appropriate programs should take advantage of referral sources for services if unable to provide them.
 - c) Packing/Moving Assistance: Client's belongings are packed in suitably sturdy containers to client specifications. Cartons weighing less than 20 pounds or small, easily moveable furniture and appliances may be moved to a central location for pick-up by professional moving personnel.
 - d) Special Cleaning of Unhealthy Environments: The area specified is cleaned in compliance with local ordinance and/or client specifications. Waste is properly disposed of or positioned for municipal removal. Toxic waste, tires, and other materials that cannot be disposed of through municipal waste removal services, are transported to appropriate municipal disposal site. Programs should take all necessary precautions to minimize potential risk to chore workers. Providing special cleaning services are at the discretion of programs. Where appropriate programs should take advantage of referral sources for services if unable to provide them.

3. Minor Home Repair: Since every repair is unique, standards can only be set on a case-by-case basis. All minor home repairs and modifications necessary to make living areas safe for clients with decreased mobility or motor ability will be completed consistent with local ordinances and client needs and wishes. In

general, the term "minor" indicates that there is no permit required for completion of the repair. Repairs or modifications requiring permits or licensed workers will not be completed except, in rare cases, by outside vendors who are so licensed and who have obtained the necessary permit(s).

4. Yard Work and Snow Removal (ongoing jobs)
 - a) Lawn Mowing: Lawn areas are completely mowed per client specifications. Grass may be mulched or bagged. Clippings are to be removed from all sidewalks, driveways, etc. If grass is bagged, bags are placed in appropriate area for municipal pick-up or removed by chore worker. Bagging, edge trimming, and other detail work may be completed by client if physically able and/or to limit expense to client.
 - b) Snow Removal: Snow and ice are completely removed from specified areas with shovel or snow blower. All doorways are cleared sufficiently to permit exit in case of emergency. Public sidewalks are completely cleared per municipal ordinances. If client uses a walker or wheelchair, any additional paths (e.g., through backyard to trash pick-up site) are cleared sufficiently to accommodate client's conveyance. Rooftop removal is offered only under critical circumstances; when this is done, worker safely uses proper tools to clear roof.
5. Routine Indoor Housekeeping (ongoing jobs)
 - a) Vacuuuming: All living areas are vacuumed per client specifications. Light furniture and objects such as wastebaskets are moved and replaced following completion of vacuuming, heavy furniture is left in place.
 - b) Cleaning Floors: Floors are mopped or scrubbed per client specifications; light furniture is removed and replaced following completion of cleaning. If necessary, floor is swept of debris prior to cleaning.
 - c) Kitchen: All appliances, sinks, counters and cupboard surfaces are cleaned using appropriate cleaning products. Floors are mopped or scrubbed as per client specifications.
 - d) Bathrooms: Tubs, sinks and toilets are scoured using appropriate products. Any adaptive devices are thoroughly scoured. Floors are mopped or scrubbed per client specifications.

One unit of chore service = one contact hour.

Section 4 – General Provision

Provider agrees to adhere to assurances of compliance and certifications as mandated by the federal and state governments as well as the MAAA. Current assurances include General Assurances, Section 504 of the Rehabilitation Act of 1973, Civil Rights, Non-Construction Programs, Lobbying and Debarment.

MAAA reserves the right to change the standards at any time based on mandates from the federal and state governments as well as the MAAA Board of Directors.

XII. Site Visit

According to the 2005 Chore Request for Proposals (RFP) each grantee agrees to participate in an annual site visit (p. 23). Traditionally Metropolitan Area Agency on Aging (MAAA) Contracts / Grants Managers coordinated site visits by sending out a questionnaire and inviting MAAA Board Members, staff and other interested individuals to attend. The following information notes recent changes in the site visit structure:

On-Site Visits: Site visits shall be conducted by Contracts/Grants Managers a minimum of one-time per year using an agency on-site assessment tool that provides an in-depth understanding of an organization's management of programs and compliance with funding priorities and program policies. The on-site assessment tool and, in year 3 a site visit guide/ program summary report, shall be sent out 2-weeks prior to the scheduled visit to enable the grantee or contractor time to complete it and send it back into MAAA before the date of the visit.

The on-site assessment tool (using a yes/no questionnaire format with documentation back-up) helps ensure that program requirements are complied with, that staff are informed of and carry out program policies and procedures, and that organizational reports and related activities have supporting documentation. The tool will include the five elements of a Limited Scope Audit, e.g., Allowable Activities, Allowable Costs, Eligibility, Matching Levels of Effort, and Reporting. On-site visits or LSAs enable MAAA to ensure that federal awards are used for authorized purposes in compliance with laws and regulations, contract or grant provisions, and ensure that performance goals are achieved.

If a Contracts/Grants Manager has concerns, upon completion of the on-site assessment or any other time deemed appropriate, they will immediately notify MAAA's Financial Officer and Accountant in writing (cc: Programs and Services Director) of specific issues and concerns and request that a Financial Review of the organization be scheduled.

In year 3, the on-site visit will include representatives from the MAAA Board and Planning Committee, and other individuals interested in the funded organization's project. The focus of the visit and guide is to help provide MAAA's staff and guests with a broader understanding of the program, services, client demographics, issues/challenges and successes, future plans, etc.

The emphasis of the on-site assessment tool and on-site visit guide may change dependent upon emerging trends, issues, needs, etc.

Upon completion of the on-site assessment, a brief written report, including any corrective action if needed, is completed and provided to the grantee/contractor.

XIII. Cost Sharing & Contributions

Cost Sharing Policies

As mandated by the MBA the only services eligible for cost sharing implementation are Respite, Counseling and Supplemental Services under the Title III-E National Family Care Support Program (NFCSP) services.

Voluntary Contribution Policies

All other services, including those not eligible for cost sharing policies are eligible to implement voluntary contributions. According to the Older Americans Act (Sec. 315b4A-E), providers will

1. Provide each recipient with an opportunity to voluntarily contribute to the cost of a service;
2. Clearly inform each recipient that there is no obligation to contribute and that the contribution is purely voluntary;
3. Protect the privacy and confidentiality of each recipient with respect to the recipient's contribution or lack of contribution;
4. Establish appropriate procedures to safeguard and account for all contributions; and
5. Use all collected contributions to expand the service for which the contributions were given.

Organizations that utilize voluntary contribution policies cannot:

- Mandate a fee or rate
- Means test for any service

Programs are encouraged to communicate the cost of the service being provided so that participants know the value of the service they receive. This will help guide them in their decision as to the amount of their voluntarily contribution.

XIV. Chore Network

As a network, the Title III chore providers meet monthly. The meetings consist of a training or educational guest speaker, a round robin discussion of service, administrative or financial delivery models, updates from MAAA and general questions and answers.

A schedule is made available at the beginning of the year. In addition to the chore network meetings, MAAA provides opportunities for new staff within provider organizations to participate in an orientation to MAAA. Finally, in November MAAA hosts an all provider meeting that all grantees are encouraged to attend.

XV. Scholarship

For 2008, MAAA has approximately \$2,000 for scholarships to support organizational improvements in non-profit organizations that provide services to older adults. Scholarships are awarded for a specific organizational improvement such as fundraising, board training, financial management, human resources management, strategic planning, service development, and individual skill development for program services. Scholarship applications for conferences can be applied for, but applicants must explain how the conference and relevant breakout sessions relates to the organization and the programs/services it provides.

Eligibility Requirements

- Applicants must be a non-profit organization that provides direct services to older adults and family caregivers within the seven-county metropolitan area.
- Applicants must be an experienced service provider (incorporated for a minimum of 2 years).
- Applicants with a staff of 10 or fewer and/or organizations serving primarily minority seniors and low-income seniors will be given preference.
- Applicant organizations cannot receive more than 2 scholarship(s) in a 12-month period.
- Applicant organizations may apply for a maximum of \$250 per scholarship.
- Attendance at proposed training, workshop, or conference must occur by December 31, 2008.
- Training, workshop or conference, e.g., report summary, must be submitted to MAAA within 30 days of attendance.

E-mail, fax or mail one copy of the application to: Metropolitan Area Agency on Aging, Attn: Bob Anderson, 2365 N McKnight Rd, Ste 3, North Saint Paul, MN 55109. Phone: 651-917-4649, Fax: 651-641-8618. E-mail: bob@tcaging.org.

Applications will be reviewed by the 15th of each month. To be considered, applications must be submitted to MAAA by 4:30 p.m. of the last business day of the prior month.

Training Scholarship Agreement

Organizations will be notified of MAAA's decision by the 20th of each month. MAAA will expect to receive, within 30 days after training, proof of attendance and a brief summary describing the quality of the training, recommendations, and application to their organization.

Training Withdrawal or Cancellation

Organizations will be responsible for reimbursing MAAA for any scholarship funds forfeited by applicant due to nonattendance or withdrawal from training.

XVI. Funding Reimbursement

Reimbursement shall be in one initial cash advance of 12.5% of the total allocation followed by quarterly cost reimbursement based on the previous quarter's expenses as documented.

Reimbursement will then occur as follows:

January 2008: 12.5% of allocation

April 2008: amount requested in financial report

July 2008: amount requested in financial report

October 2008: amount requested in financial report

January 2009: amount requested in financial report less initial 12.5% advance

In the event an organization or agency faces a hardship with a reimbursement, an advance may be requested in writing from an authorized individual. The memo should detail the need for the advance and assurances of compliance with grant obligations.

An agency considered not compliant with grant obligations may not be eligible for an advance.

XVII. Vulnerable Adult Reporting

Chore providers are a social service agency and as such fall under the statute of mandated reporters. However, the clients that are served by chore providers may not be categorical vulnerable adults. It is not the responsibility of the chore provider to determine categorical vulnerable adult status.

If you suspect a senior is being abused call the Common Entry Point (CEP) in your county. Be prepared to answer questions like: who was abused, when did the abuse occur, where did it occur, who did the maltreatment, and any other pertinent information. After a report is filed, the county begins an investigation and protection of the person begins. If a licensed program is involved, the report is forwarded to either the Minnesota Department of Health or the Minnesota Department of Human Services' Licensing Division. The state prohibits any retaliation for filing a report.

COUNTY	DAY	EVENING
ANOKA	(763) 422-7168	(612) 291-4680 Red Cross
CARVER	(952) 361-1600	(952) 291-4680 Red Cross
DAKOTA	(651) 554-6000	(952) 891-7171 Crisis Line
HENNEPIN	(612) 348-8526	(612) 348-8526
RAMSEY	(651) 266-4012	(651) 291-6795 Red Cross
SCOTT	(952) 445-7751	(651) 291-4680 Red Cross
WASHINGTON	(651) 430-6484	(651) 291-6795 Red Cross

From the Minnesota Board on Aging & Department of Human Services Adult Protective Services Unit.

XVII. Termination of Services

It may be necessary at times to terminate service provision to a client because of concerns for the safety of workers.

Termination may be due to several reasons including but not limited to:

- Forcing of beliefs or coercion by clients onto volunteers or workers;
- Inappropriate attire when worker is present and refusal to dress appropriately;
- Demanding more services than chore provider is able to provide;
- Services are beyond the scope of the chore services;
- Physically abusive;
- Verbally abusive (including screaming, disrespect, etc.);
- Hostile or inappropriate mailings or in person contact;
- Harassment of workers or volunteers;
- Taking advantage of workers or volunteers and not respecting boundaries; and
- Emotionally unstable.

Providers should strive to work with all clients including any determined to be “difficult.” Referrals to appropriate agencies for interventions should also be considered when determining termination.

When difficulty has reached a point when communicating with the client is not constructive services may be terminated.

It is up to providers to develop a termination policy within their organization that includes provisions to appeal as noted in the section VI.

When working with a potentially hostile client several things should be kept in mind:

- Documentation is extremely important. In the event of an appeal to MAAA or the MBA, provider documentation will be reviewed.
- During a hostile conversation is appropriate for the chore provider to say, “It is important that we have a conversation that is respectful. If you can calm down we can continue the conversation or we’ll have to continue this conversation later.”
- Utilize agency harassment policies when creating client harassment policies.
- Keep open communication with other staff within the agency.
- Inform MAAA of client terminations in narrative reports so MAAA is informed of the situation in the event the client calls.
- Set clear boundaries with clients.
- When appropriate, refer as appropriate to mental health services or to the Senior LinkAge Line[®] and Disability Linkage Line[™].
- Termination should occur in written format. A copy of the termination letter should be sent to MAAA.