



# SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY



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March 26, 1986

Law & Legislative Committee  
of the City Council  
Sacramento, California

Honorable Members in Session:

**SUBJECT:** Assembly Bill 4141 - Connelly - Sheltered Housing

## SUMMARY

We have reviewed the proposed legislation and are in support of its purpose to assist the frail elderly and functionally impaired adults living in non-profit and public housing.

## BACKGROUND

This bill, introduced February 21, 1986, requires and enables the Department of Aging to establish a sheltered housing demonstration program for frail elderly persons 60 or over, or functionally impaired adults. The purposes are to avoid early institutionalization of, and maintain or return to semi-independent living, eligible persons. A sheltered housing program shall provide case management, social services coordination and support services to include: one congregate meal per day, housekeeping and personal services, on a sliding scale fee structure.

Four programs will be funded, two in Northern California, two in the South. Two programs shall be operated by public housing authorities, two by private non-profit organizations. Two of the programs shall be in areas served by Multipurpose Senior Services Program and Linkages Program and shall be related to those programs, and two in areas not served by Linkages Programs. The individual housing projects must house 75 or more low- or low-moderate income elderly or functionally impaired adults persons, and must have 10 to 20% proportions of service-eligible residents.

Program selection will result from response to a Request for Proposals, to be issued by the Department by March 1, 1987. Each demonstration program location will be required to perform a casefinding survey to identify potential clients prior to selection for funding, and shall collect and compile specified data. Programs will employ persons to perform casefinding and case management functions who meet criteria established by legislation.

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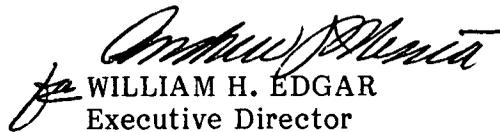
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The four programs shall be funded up to \$500,000 annually, beginning in 1986, for three years. The Division of Long Term Care will establish a sliding scale of payments by participants. The Department of Aging is to plan for continued funding of the programs, as long as cost-benefit performance is demonstrated.

## RECOMMENDATION

We recommend support of the proposed legislation. Implementation by AB 4141 will allow older persons the care needed to remain in "their home" in public housing.

Respectfully submitted,

  
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Executive Director

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kd/0065M

**ASSEMBLY BILL**

**No. 4141**

**Introduced by Assembly Member Connelly**

February 21, 1986

An act to add Chapter 6 (commencing with Section 9500) to Division 8.5 of the Welfare and Institutions Code, relating to sheltered housing, and making an appropriation therefor.

LEGISLATIVE COUNSEL'S DIGEST

AB 4141, as introduced, Connelly. **Sheltered housing.**

Existing law does not require the Department of Aging to establish a sheltered housing program.

This bill would require the Department of Aging to establish a sheltered housing demonstration program, whereby the department is required to contract with 4 sponsoring agencies to provide sheltered housing for frail elderly persons 60 years of age or older or functionally impaired adults.

The bill would appropriate \$1,500,000 from the General Fund to the Department of Aging, for allocation to demonstration housing projects.

Vote:  $\frac{2}{3}$ . Appropriation: yes. Fiscal committee: yes. State-mandated local program: no.

*The people of the State of California do enact as follows:*

1 SECTION 1. Chapter 6 (commencing with Section  
2 9500) is added to Division 8.5 of the Welfare and  
3 Institutions Code, to read:

4

5 CHAPTER 6. SHELTERED HOUSING PROGRAMS

6

7 Article 1. Legislative Intent and Definitions

8

1 9500. The Legislature finds and declares the  
2 following:

3 (a) It is committed to the establishment of a  
4 comprehensive community-based long-term care system  
5 that will enable frail elderly and functionally impaired  
6 adults to remain living in their homes rather than  
7 institutions.

8 (b) While the system requires further development,  
9 key elements have been established. The key elements  
10 include the Preadmission Screening Program, In-Home  
11 Supportive Services Program, Adult Protective Services,  
12 Adult Day Health Care Program, home delivered meals,  
13 Institutionalization Prevention Services Program, the  
14 Linkages Program, and the Multi-Purpose Senior  
15 Services Program.

16 (c) The effort to develop a comprehensive  
17 community-based long-term care system has been  
18 focused primarily on persons residing in their own homes  
19 or apartments without giving due attention to persons  
20 whose home is a public housing project for senior citizens  
21 and functionally impaired adults.

22 (d) Many residents of housing projects experience the  
23 same aging conditions and loss of self-care abilities as  
24 their peers who reside in their own homes.

25 Inflexible and inappropriate support contributes to  
26 premature loss of functional independence. As the  
27 elderly become more dependent and less capable of  
28 resisting institutionalization, they can be denied the  
29 legitimately private aging process that gives meaning  
30 and dignity to life.

31 (e) The phenomena of aging in place is occurring for  
32 residents of public housing projects. These residents are  
33 characterized as having an average age of 78 years, have  
34 been residents of the housing projects for \_\_\_\_\_ years,  
35 are 75 percent female, and have an average income near  
36 the current poverty level. Seventeen percent are  
37 considered frail and require assistance with  
38 independence.

39 As a result of aging in place, the majority of public  
40 housing tenants are now in need of more supportive type

1 services than when they entered the projects. This  
2 population needs assistance to remain living as  
3 independently as possible while remaining in their public  
4 housing projects.

5 (f) Housing authorities of existing public housing sites  
6 have no consistent policy to obtain and coordinate  
7 supportive services for their residents. Services currently  
8 offered on site to enable the frail population to remain  
9 independent are very limited and fragmented. Senior  
10 citizen housing projects have a standard of minimum  
11 functioning which involves the resident's ability to cook,  
12 clean, groom, and walk independently. Elderly residents  
13 who can no longer function under these minimum  
14 standards are forced to relocate to costly institutions or  
15 the homes of relatives.

16 (g) Family members currently provide approximately  
17 80 percent of the long-term care given to the elderly.  
18 Primary caregivers to the frail elderly are  
19 overwhelmingly wives, daughters, sisters,  
20 daughters-in-law, nieces, and other women. However,  
21 with the increasing role of women in the labor force, the  
22 decreasing family size, and increase in divorces, female  
23 relatives are less available to care for aging family  
24 members.

25 (h) In many cases, the lack of coordinated community  
26 based long-term care services leads to nursing home  
27 institutionalization. Without coordinated services the  
28 usual caretaker, such as the family, friends, or the  
29 personal care attendant, can no longer cope with  
30 providing full-time care. In many situations the  
31 caretaker's only alternative is to recommend  
32 institutionalization.

33 9501. In enacting this chapter, it is the intent of the  
34 Legislature to use existing housing stock while at the  
35 same time using and better coordinating existing public  
36 and private services to promote independent living to  
37 frail seniors who face unnecessary institutionalization. To  
38 achieve this goal, the Legislature hereby establishes a  
39 sheltered housing demonstration program. The primary  
40 focus of the program is to administer a case-management

1 program of supportive services for frail seniors who live  
2 in public housing units.

3 9502. For purposes of this chapter, the following  
4 terms have the following meanings:

5 (a) "Department" means the Department of Aging.

6 (b) "Sheltered housing" means a residential  
7 environment consisting of independent living assisted by  
8 case management, congregate meals, housekeeping, and  
9 personal services in order to maintain, or return to, a  
10 semi-independent lifestyle and to avoid premature  
11 institutionalization of eligible project residents.

12 (c) "Eligible housing project" means a conventional  
13 housing project specifically designed to accomodate  
14 low-or low-moderate income elderly or functionally  
15 impaired adults.

16 (d) "Eligible project resident" means a frail elderly  
17 person 60 or more years of age, or a functionally impaired  
18 adult 18 years of age or older, who lives in an eligible  
19 housing project who has temporary or periodic  
20 difficulties with two or more essential activities of daily  
21 living such as feeding, bathing, grooming, dressing, or  
22 transferring, who have an inadequate informal or formal  
23 support network, and who are at risk of  
24 institutionalization.

25 (e) "Long-term care" has the meaning specified in  
26 subdivision (c) of Section 9390.

27 (f) "Frail" has the meaning specified in Section 9111.

28 (g) "Services eligible under this chapter" means at  
29 least one mandatory meal a day, personal assistance, and  
30 housekeeping.

31 (h) "Functionally impaired adults" means any adult  
32 18 years of age or older, who has restricted self-care  
33 capabilities, is limited in functional ability, and is unable  
34 to independently perform personal and instrumental  
35 activities of daily living and associated tasks, or is unable  
36 to establish and maintain an independent living  
37 arrangement in the absence of long-term care facilities.

38 (i) "Personal services" means:

39 (1) Assistance with grooming, bathing, eating, or  
40 transferring.

- 1 (2) Monitoring medication schedules.  
2 (3) Arranging for emergency services.  
3 (4) Assistance with shopping for personal needs  
4 (pharmacy, laundry, toiletries).  
5 (5) Delivery of meals to rooms.  
6 (6) Other services as determined through regulations  
7 issued by the department.  
8  
9

## 10 Article 2. Selection of Programs

11 9505. (a) The department shall establish at least four  
12 demonstration sheltered housing programs. Two of the  
13 programs shall be located in counties in the northern part  
14 of the state and two shall be located in counties in the  
15 southern part.

16 (b) Two sponsoring agencies shall be public housing  
17 authorities and two sponsoring agencies shall be private  
18 nonprofit housing agencies which are established for the  
19 purpose of providing housing to low-income elderly or  
20 disabled persons and which have demonstrated  
21 experience in coordinating services for their residents.

22 (c) A sponsoring housing agency shall have all of the  
23 following qualifications:

24 (1) Have demonstrated experience in identifying and  
25 assessing the needs of the elderly or disabled.

26 (2) Have demonstrated experience in coordinating  
27 services and ensuring access to services for the elderly or  
28 disabled.

29 (3) Have demonstrated ability to provide ongoing  
30 evaluation and monitoring of programs for  
31 appropriateness and efficiency in providing services to  
32 individual program participants.

33 9506. The department shall allocate funds to four  
34 demonstration housing projects to provide services to  
35 eligible housing project residents. The department shall  
36 develop a request for proposals by sponsoring housing  
37 agencies for the provision of services under this chapter  
38 to eligible project residents in eligible housing projects by  
39 February 1, 1987, and shall submit the request to local  
40 communities by March 1, 1987. The request for proposals

1 shall include the qualifications of sponsoring agencies and  
 2 criteria for proposal selection. The division may refer  
 3 proposals received in response to the request for  
 4 proposals to appropriate local community organizations  
 5 for review and recommendations.

6 9507. (a) The department shall select four  
 7 demonstration projects from the proposals received from  
 8 sponsoring housing agencies. Two of the demonstration  
 9 projects shall be in resource-complete areas, as  
 10 determined by the Department, and shall be directly  
 11 related to a Linkages Program and a Multipurpose Senior  
 12 Services Program. The other two demonstration projects  
 13 shall be located where there is no Linkages Program.

14 (b) In implementing subdivision (a), the department  
 15 shall make a selection of four projects which ensures that  
 16 the total number of persons served by the four projects  
 17 is not less than 500.

18 9508. The criteria for program selection shall include  
 19 all of the following:

20 (a) The target population shall be those frail elderly or  
 21 functionally impaired adults who live in public or private  
 22 nonprofit housing projects that do not presently provide  
 23 for supportive services other than those generally  
 24 provided through housing management services and  
 25 information and referral services.

26 (b) The individual housing projects shall house at least  
 27 75 residents; the proportion of eligible project residents  
 28 shall be no fewer than 10 percent nor greater than 20  
 29 percent of all residents.

30 (c) Coordination and cooperation with other service  
 31 providers in the area as demonstrated by memoranda of  
 32 understanding and working agreements.

33 (d) Meet staff requirements pursuant to Sections 9510  
 34 and 9511.

35 (e) The general soundness, preparation, and design of  
 36 the proposal.

37 9509. Each sheltered housing program applicant shall  
 38 perform a casefinding survey to identify eligible project  
 39 residents prior to selection by the department for  
 40 implementation of the program. Each selected program

1 applicant shall perform an assessment of eligible project  
 2 residents and shall coordinate the provision of services in  
 3 accordance with the assessment.

4 9510. Staff providing care or services on behalf of a  
 5 sponsoring agency shall meet all current licensing,  
 6 certification, and educational standards required by state  
 7 law and local ordinances. Sponsoring agencies shall also  
 8 be licensed to provide services pursuant to this chapter  
 9 as required by state law and local ordinances.

10 9511. The program shall employ persons to perform  
 11 casefinding and management functions who shall meet  
 12 the following qualifications:

13 (a) Have a bachelor's degree in health, social work, or  
 14 an academically related area.

15 (b) Have three years of experience providing social,  
 16 health, support counseling, information and referral, and  
 17 advocacy or like services to the elderly.

18 9512. The Division of Long Term Care of the  
 19 department shall develop a sliding scale of payment for  
 20 services, which shall take into consideration available  
 21 resources, including Medicare, Medi-Cal, and other  
 22 third-party covered services, and those services provided  
 23 by existing programs.

24 9513. (a) Each demonstration project shall collect  
 25 and compile information specified in subdivision (c),  
 26 which shall be submitted to the department in a manner  
 27 specified by the department.

28 (b) The department shall coordinate the information  
 29 received pursuant to subdivision (a) and shall submit an  
 30 interim report to the Legislature, no later than 15 months  
 31 after the demonstration programs have begun to serve  
 32 eligible project residents, and shall submit a final report  
 33 to the Legislature 32 months after the demonstration  
 34 projects have begun to serve eligible project residents  
 35 pursuant to this chapter.

36 (c) Demonstration projects shall collect and compile  
 37 information, as required by the department.

38 SEC. 2. (a) The sum of one million five hundred  
 39 thousand dollars (\$1,500,000) is hereby appropriated,  
 40 without regard to fiscal year, from the General Fund to

1 the Department of Aging for allocation to the four  
2 demonstration housing projects established pursuant to  
3 Chapter 6 (commencing with Section 9800) of Division  
4 8.5 of the Welfare and Institutions Code, which shall be  
5 allocated as follows:

6 (1) The sum of five hundred thousand dollars  
7 (\$500,000) shall be allocated to the four demonstration  
8 housing projects for the first year of implementation of  
9 the projects.

10 (2) The sum of five hundred thousand dollars  
11 (\$500,000) shall be allocated to the four demonstration  
12 housing projects for the second year of implementation  
13 of the projects.

14 (3) The sum of five hundred thousand dollars  
15 (\$500,000) shall be allocated to the four demonstration  
16 projects for the third year of implementation of the  
17 projects.

18 (b) The Department of Aging shall plan for continued  
19 funding of the projects, as long as cost-benefit  
20 performance is demonstrated by the projects.