

## DEPARTMENT OF AGING

1600 K STREET  
 SACRAMENTO, CA 95814  
 Internet Home Page [www.aging.state.ca.us](http://www.aging.state.ca.us)  
 DD Only 1-800-735-2929  
 FAX Only (916) 327-3661  
 (916) 322-0773



# PROGRAM MEMO

|   |  |
|---|--|
| TO: <b>Area Agencies on Aging Directors</b>   | NO.: <b>PM 00 -15 (P)</b><br>Effective date: <b>July 1, 2000</b> |
| SUBJECT: <b>Data Terms and Definitions and Reporting Frequency for Foster Grandparent / Senior Companion Programs</b>   | DATE ISSUED:<br><br><b>June 28, 2000</b>                         |
|   | EXPIRES:<br><br><b>Until Superseded</b>                          |
| REFERENCES: <b>PM 98-26 P</b>   | SUPERSEDES:  |
| PROGRAMS AFFECTED:<br><input type="checkbox"/> All <input type="checkbox"/> Title III-B <input type="checkbox"/> Title III-C1/C2 <input type="checkbox"/> Title III-D <input type="checkbox"/> Title III-F <input type="checkbox"/> Title V<br><input checked="" type="checkbox"/> CBSP <input type="checkbox"/> HICAP <input type="checkbox"/> MSSP <input type="checkbox"/> Title VII <input type="checkbox"/> ADHC <input type="checkbox"/> Other<br><b>Foster Grandparent / Senior Companion Programs</b> |  |
| REASON FOR PROGRAM MEMO:<br><input type="checkbox"/> Change in Law or Regulation <input type="checkbox"/> Response to Inquiry <input checked="" type="checkbox"/> Other Specify:<br><b>Clarification of Data Terms and Reporting Frequency</b>  |  |
| <b>INQUIRIES SHOULD BE DIRECTED TO YOUR AAA-Based Team or Data Interpretation Team</b>  |  |

The purpose of this Program Memo is to address Foster Grandparent (FG) program and Senior Companion (SC) program reporting issues, specifically clarifying key terms used in reporting and modifying the way quarterly utilization data is reported. **These new procedures do not affect electronic programming and are effective July 1, 2000.**

## Background

State Law, Welfare and Institutions Code, Sections 9544 and 9547, state that the FG and SC programs shall operate "...in accordance with the Federal National and Community Service Trust Act of 1993 (42 U.S.C. Sec. 12651 et seq.)." Therefore, federal rules apply to the operations of these State funded programs, with the exception that the California Department of Aging (CDA) has the authority and the responsibility to measure program performance [Welfare and Institutions Code, Section 9102(a), (1), and (5)].

Prior to July 1, 1998, the FG and SC programs reported to CDA using paper "Quarterly Progress Reports" provided by the Corporation for National Service (CNS). Beginning July 1, 1999, this reporting converted to a new electronic format as specified in PM 98-26 (P), issued October 2, 1998. The detailed data reporting specifications for service units and profile data are spelled out in layouts attached to PM 98-26 (P) and are still effective as of this date.

After the first reporting period of SFY 1999-00, it came to our attention that FG and SC providers were experiencing problems meeting the reporting requirements for these two programs. Area

Agencies on Aging (AAA), in executing their duties for reporting to the State, required FG and SC programs to report data exactly as specified in PM 98-26 (P). Providers raised issues around these new requirements with particular emphasis on a demand to report demographic data on "clients." After examining the issues, CDA offers the following clarification of terms:

- The definition of the term "client" as used in CDA's instructions in PM 98-26 (P), is not the same as the definition used by the federal government. Agencies operating both State funded and federally funded FG and SC programs were confused by the differences in meaning. The meaning that the State applied to the term "client" was the "person served" by the program. The federal government uses the term "client" to refer to persons served by the volunteers. This difference in meaning resulted in a misunderstanding about which population the annual demographic profile data was to be reported. The State intended that profile (demographic) data would be compiled only on the volunteers. The layout contained in PM 98-26 (P) states -- for both the Foster Grandparent and the Senior Companion programs -- "This file will contain records with descriptive information on each volunteer providing service," but also says... "The *clients* referenced on this file consist of the *volunteers* for all service categories..." The original intent of those instructions was for the provider to collect data on the volunteers only, not their clients.
- In addition, CDA requires the AAAs to report service units' data more frequently than CNS. CNS requires federal providers to report service units information once every year. There is no federal quarterly reporting. The service unit data in the State's specifications require quarterly submission. This was identified as an added burden on providers reporting to both federal and State agencies.

## 1. Terms and Definitions

To address the confusion over what annual profile data is to be collected, whether on volunteers or the clients of the volunteers, CDA has agreed to use the federal CNS terminology. This change in definition applies only to the Foster Grandparent and Senior Companion programs and refers to the senior volunteer as the person paid a stipend, while the term "client" refers to the senior, adult, or child being served by the senior volunteer. Profile (demographic) data is to be reported annually only on the volunteers and not on their clients.

In the CDA layout [PM 98-26 (P)] for the SC program, the unit of measure for the first 11 data elements (those naming a variety of health impairments) refers to the number of seniors or frail adults served. For FG, the first 18 data elements (a variety of children's' problems) refers to the children served by the volunteers. The remaining service units refer to volunteer hours.

Lining up the definition for client with the federal CNS should eliminate any confusion on the part of providers reporting to both CDA and to CNS. Detailed demographic profile reporting is done on the volunteers, not the clients of volunteers.

## 2. Reporting Frequency

While the CNS requires providers of FG/SC services to report service unit data annually, the CDA asks, in PM 98-26 (P), to report utilization data quarterly. To bring the two reporting cycles more in alignment, the Department requires AAAs/providers to report utilization data in the following manner:

- AAAs/Providers must continue to report FG/SC volunteer hours on a quarterly basis. This will allow CDA to continue to track volunteer hours throughout the year. Hours are cumulative by quarter.
- AAAs/Providers must, on their quarterly reports, fill in the remaining utilization data (the data other than volunteer hours) with zeros in the first three quarters and report in the last quarter only. In effect, these become annual data because these data are not cumulative. Do not leave blanks, use zeros to fill in the data for the first three quarters.

This method of reporting will align the State and federal reporting requirements for clients served, by type, to an annual cycle. The combination of these two changes should provide relief to both the AAAs and providers of FG and SC programs without affecting the quality of reporting or the programming of automated systems.

If you have any questions regarding the new instructions contained in this PM, please contact either your assigned AAA-Based Team Program Specialist or the Data Interpretation Team.

  
Lynda Terry  
Director