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U.S. Department of Housing and Urban Development
Office of Policy Development and Research



Elderly Independence

HOPE

Homeownership and Opportunity
for
People Everywhere

DEPARTMENT OF HOUSING
AND URBAN DEVELOPMENT

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Elderly Independence

HOPE

**Homeownership and Opportunity
for
People Everywhere**

"HOPE for Elderly Independence will enable the elderly to live more independent and dignified lives. By combining housing assistance with supportive services, Elderly Independence will help senior citizens to stay in their homes and avoid premature institutionalization."

Jack Kemp
Secretary of Housing and
Urban Development

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BACKGROUND

What Is Elderly Independence?

- The HOPE legislation provides for a 5-year demonstration program to test the effectiveness of combining housing certificates and vouchers with supportive services to assist frail elderly individuals in continuing to live independently. Elderly Independence offers an efficient way to provide rental assistance and support services to a population that is in need of both kinds of help.
- Public Housing Authorities participating in Elderly Independence will provide rental assistance, service coordination, and an array of services that address the special needs of the frail elderly. These may include personal care, case management, transportation, meals, counseling, supervision, and other services essential for achieving and maintaining independent living. Medical services are not included.

Why Is Elderly Independence Important?

- By the year 2010, the number of Americans over age 65 will have grown from 28.6 million in 1985 to about 39 million, or 14 percent of the population. Nineteen million of these elderly citizens will be 75 or older; 6.5 million will be over 85, increasingly frail and at risk of institutionalization.
- Many elderly persons have functional limitations but are not receiving the services that would allow them to continue to live independently -- about 30 percent of all noninstitutionalized persons over age 65 who need help dressing, 40 percent who need help bathing, and 44 percent who need help going outside the home.
- Elderly Independence provides an opportunity for HUD, the PHA, the Area Agency on Aging, local service providers, and the frail elderly participants themselves to cooperate in designing and paying for a package of housing and services that will provide the minimum support necessary to help the frail elderly participant remain independent in the community. Funds provided by HUD will be an important tool in leveraging other funds in the community and filling the gap in available services.

OPERATIONS

How Will Elderly Independence Work?

- Public Housing Authorities will compete for a share of the 1300 certificates and vouchers and \$10 million in supportive services funds that HUD is providing for this demonstration. HUD's supportive services funding will pay 40 percent of the cost of the service package.
- The PHA must match this funding with 50 percent of the cost of the services. The frail elderly participants are expected to pay 10 percent of the costs, up to a maximum of 20 percent of their adjusted incomes. If the elderly participants cannot afford their portion of the costs, HUD and the PHA will share the remaining cost equally.
- Elderly participants will be selected from the Section 8 waiting list or, if necessary, through outreach into the community. To participate, they must be 62 or older, income eligible for Section 8 certificates, and deficient in at least three activities of daily living as defined for the demonstration. They also must live in – or agree to move to – a dwelling unit which meets the Section 8 housing quality standards.
- Each PHA must create a volunteer Professional Assessment Committee (PAC) which will screen applicants for admission to the program and assure that the PHA will provide only those services necessary to help the participants live independently.
- The PHA must also develop a supportive services plan and a case management and assessment plan in consultation with the Area Agency on Aging. A services coordinator may be hired to assist the PAC and implement the services plan.
- The services must be delivered for the full 5-year term of the demonstration. Services provided under the demonstration must be in addition to those previously available, and the PHA must agree to maintain the services that were previously provided.

How Will Participating PHAs Be Selected?

- HUD Field Office and Headquarters staff will review the applications, with final selection to be made at Headquarters. Applications will be rated on six selection criteria:
 - Demonstrated ability of the PHA to develop and operate the proposed supportive services program in an efficient and effective manner.
 - PHA's overall ability to administer the Section 8 program.
 - Quality of the proposed supportive services program.
 - Extent to which the proposed funding for supportive services is, or will be, available.
 - Need for a program providing both housing assistance and supportive services for frail elderly, and the extent to which the program will meet the needs of the people it proposes to serve.
 - Role of the Area/State Agency on Aging in the supportive services program.

PREVIOUS EXPERIENCE

Congregate Housing Services Program

- While HUD has never funded a community-based services program for the frail elderly, it has supported a project-based program since 1978. The Congregate Housing Services Program (CHSP) funds supportive services in congregate housing for the elderly or for the non-elderly handicapped that was built under the public housing and Section 202 programs. Begun as a demonstration in 1978, CHSP became a permanent program in 1987.
- CHSP supports 60 projects in 33 States, providing services for about 2,000 persons. Participants must be income eligible for public housing or Section 202. Since 1983, assistance with three or more activities of daily living, (defined in the same way as in Elderly Independence) has also been a requirement.
- CHSP uses a PAC and a services coordinator to determine program eligibility and services needed and to arrange for services delivery. Cooperation with the Area Agency on Aging is also required. Next to meals, which are mandatory, the most frequently needed service is housekeeping/chore service.

Research Findings

- An evaluation of the congregate housing demonstration showed that the targeting of services to the frail and the tailoring of services to meet individual needs and thus maintain independence were well done.
- The demonstration's test for frailty was the need for assistance with one activity of daily living (ADL). Because that did not prove a sufficient measure of vulnerability to institutionalization, the test was later changed to three ADLs (see below).
- The program increased the total number of hours of care that participants received, but did not substitute for other formal services or lessen the amount of informal services received.
- The success of the program seemed to be directly related to the qualifications and abilities of the services coordinators.

Activities of Daily Living

As defined by the Secretary of Housing and Urban Development for the purposes of the Elderly Independence program, activities of daily living include:

- Eating — May need assistance with cooking, preparing or serving food, but must be able to feed oneself.
- Bathing — May need assistance in getting in and out of the shower or bathtub, but must be able to wash oneself.
- Grooming — May need assistance in washing hair, but must be able to take care of personal appearance.
- Dressing — Must be able to dress oneself, but may need occasional assistance.
- Home Management Activities — May need assistance in doing housework, grocery shopping or laundry, or in moving from one location to another for such activities as medical appointments and shopping, but must be mobile. The mobility requirement does not exclude persons who use wheelchairs or other mobility devices.

OTHER POSSIBLE FEDERAL FUNDING FOR SERVICES

There are three principal Federal funding sources from which a PHA might obtain matching funds to support its 50 percent share of the costs of services to be delivered under the Elderly Independence program:

- Social Service Block Grants, allocated to the States on the basis of population, have been used to pay for such services as homemaking and may be used to support many of the other services likely to be a part of Elderly Independence.
- The Older Americans Act, through Title III, provides grants for State and community programs on aging. Most of these funds are passed on to Area Agencies on Aging and may be used for supportive services, home-delivered meals, and nonmedical in-home services.
- Medicaid will pay for personal care services, including meal preparation, shopping, and dressing. If they are prescribed by a physician, these services must address a medical need, be supplied by a qualified provider, and be supervised by a registered nurse. Under the Section 2176 Home and Community-Based Services Medicaid waiver, participating States may offer a broad range of services without the medical justification and monitoring. Similar waiver provisions are available under Section 4102. These Medicaid provisions have restrictions on their use that should be closely examined.

For further information about Elderly Independence, contact Jerold Nachison, Office of Elderly and Assisted Housing, HUD, 451 Seventh St. SW, Washington, DC 20410; telephone (202) 708-3291.

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