

SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY

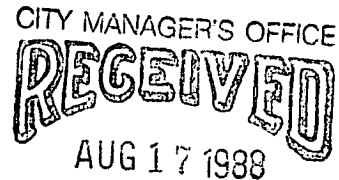
*Comm. Rpt
BTF*

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August 23, 1988

Housing Authority of the
City of Sacramento



Honorable Members in Session:

SUBJECT: Proposed Organizational Design and Short-Term
Implementation Plan for Riverview Plaza Congregate
Housing Facility

SUMMARY

This report, submitted for your approval, is setting forth the proposed organizational and long-term implementation plan for Riverview Plaza. The proposed plan delineates the functions necessary to manage and maintain an effective and cost efficient operation.

BACKGROUND

Riverview Plaza (RVP) is a \$15 million, 16-story high rise elderly congregate housing facility with an additional 23,000 square feet of commercial office space on the first two floors. The project is in process of construction and scheduled to be completed in September, 1988.

The residential area will provide 123 units for elderly housing, with 17,000 square feet of community recreational and dining space.

Riverview Plaza's approach is comprehensive. More than "just" housing, it is an innovatively designed, comfortable, affordable, assisted living complex catering to mature adults 62 years plus. Riverview Plaza supports an environment that provides a lifestyle of safety, comfort, dignity, continued living and activity for residents. Service packages will range from optional lunch and evening meal daily and monthly housekeeping services, to a complete array of support services, available on a regular basis, depending on the individual's need.

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It is the intent to make a concerted effort to market commercial space to businesses addressing the needs of downtown elderly residents (i.e. convenience store, cleaners).

It is the goal of Riverview Plaza to provide a facility designed to avoid the feeling of institutionalization and to connote a homelike atmosphere that is supportive and sensitive to the unique physical, social, and psychological needs of the residents.

New Concept of Management:

The construction of Riverview Plaza requires that the Agency develop a new management concept which embraces not only the implementation of an elderly congregate housing facility, but moves from managing elderly independent living facilities to provide a comprehensive assessment of need, to facilitate and coordinate support services, and to monitor adequacy of those services. A three-tier level of functionality, in addition to a mixed-income population, will require expanded duties and responsibilities for staff who will be specifically qualified, educated, and experienced in serving the special needs of an elderly population.

The need for affordable, well-coordinated and monitored social services will require maximizing existing resources combined with developing alternatives for unmet needs.

This report is recommending the consolidation of the administrative unit of the Community Services Division with the management unit of Riverview Plaza to:

- a. better coordinate resources and services for the residents through the maximizing of existing resources.
- b. provide a cost-efficient system for managing Agency-sponsored social service functions (the present position of "Chief of Community Services" will be revised to "Community Service/Congregate Housing Director" with the combined responsibility of managing Riverview Plaza and oversight of Agency sponsored community service programs. The staff from the Community Services Administration unit will relocate to the Riverview Plaza Management office and assume duties and functions set forth. See Exhibit A1/A2.)

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In the developmental stages, the design and construction of Riverview Plaza took into consideration issues that the facility would be attractive, accessible, and would endure for years as safe, decent housing for its elderly residents. However, it will be the role of management to positively affect the quality of life for the residents.

The operation of Riverview Plaza will be implemented in two phases:

PHASE I. DEVELOPMENTAL PLAN (INTERIM MANAGEMENT TEAM)

A. GOALS AND OBJECTIVES

The interim management for Riverveiw Plaza has the following objectives:

1. To provide manpower and expertise necessary to develop the management components to operate Riverview Plaza efficiently and effectively.
2. To implement the changes in the organizational structure, policies, practices, and procedures necessary to assure appropriate, high quality service delivery.

B. STAFF ASSIGNMENTS

The interim management team would be composed of representatives from the listed areas of:

1. Housing
2. Management
3. Maintenance
4. Community Services
5. Central Tenant Selection
6. Community Development
7. Housing Production

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PHASE II. IMPLEMENTATION OF LONG TERM MANAGEMENT PLAN (TECHNICAL SUPPORT TEAM)

A. MANAGEMENT GOAL

The management goal of Riverview Plaza will be to provide an efficient, effective congregate housing program with a high degree of resident satisfaction. Management will address and integrate major components such as housing management, housing maintenance, commercial space, marketing, legal, finance, personnel, and data processing with the establishment of a Technical Support Team to provide assistance and review. The Technical Support Team will be composed of specialists from throughout the Agency and will meet periodically to provide whatever technical assistance is needed to insure an effective monitoring management program.

B. MANAGEMENT PHILOSOPHY

The philosophy will be to encourage residents to remain as independent as possible, only relying on services as need indicates. Independence is generally treasured by all people regardless of age, and with the availability of choices a person is able to maintain a greater degree of independence in his lifestyle.

A basic premise in the management of Riverview Plaza is the knowledge that the presence of choice implies more control on the part of the residents; the absence of choice implies more control on the part of management. Management philosophy will encompass empowering residents to take responsibility for their personal well-being.

C. TYPE OF MANAGEMENT

The Authority has selected a decentralized self-management system for Riverview Plaza. The Director of Housing will have the overall responsibility for the management of Riverview Plaza. The day-to-day operation of the facility will be the responsibility of the Community Services/Congregate Housing Director who will also manage the Agency-sponsored Community Services programs.

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D. MANAGEMENT RESPONSIBILITIES

The project will house three distinctively different levels of independence of tenants pursuant to the degree of each tenant's ability to live independently:

LEVEL I: Independent (75%)

LEVEL II: Independent with support services (20%)

LEVEL III: Frail elderly (5%)

There are 3 tiers of rent at Riverview Plaza. The qualifying income ranges, number of units available and rent for each tier are:

TIER	INCOME RANGE	NUMBER OF UNITS	RENT
I	\$6,900-\$9,480	37	25% of income (\$114-\$168)
II	\$9,481-\$10,665	14	\$298
III	\$10,666-\$14,220 (or \$16,200 for a 2-person household)	72	\$326

E. NON-SHELTER SERVICES

A major management component of Riverview Plaza will be the availability of non-shelter services. This area encompasses those services not related to the physical plant but necessary to the well-being of the residents. These services include meal service, housekeeping/home chore services, personal care services, transportation, health and medical services, education, socio-recreational programs, information and referral, and counseling services. The coordination, development, and delivery of these services will be a major management responsibility requiring, perhaps, the greatest challenge due to limited funds.

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Service levels will be in direct proportion to an individual's level of independence and functionability. In planning the service package management will consider:

1. needs of the residents
2. financial capacity of programs and residents
3. staff capability and availability
4. service availability

The non-shelter service package will be continually monitored, evaluated, and updated, in accordance with changing conditions/situations.

The non-shelter service program must be flexible, reliable and versatile and should maximize the options available to the elderly residents.

F. DEVELOPING A SERVICE PACKAGE

The following steps will be undertaken in the development of a service package:

1. Health History and Appraisal/Medical Examination:

Once the resident has received an income and background eligibility certification they will be provided with: (1) a report of health history & appraisal; and (2) a report of medical examination (physician's report) which is to be completed by his personal physician and returned.

2. Medical Evaluation and Level of Independence Assessment:

Once the report is completed it will then be given to a professional licensed authorized health care provider with which facility has contracted to independently perform evaluation of functionability. Level of service determinations will be based on the criteria established in the definitions for Level I, II and III.

The residents must have each form completed and level of independence identified prior to residency.

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G. SERVICE PLAN

The Administrator will meet with resident, and if appropriate, family members, to draw up a service plan to assure that basic independent needs will be provided. Once the service plan is determined and services accessed the resident is officially certified for occupancy.

H. PRELIMINARY MONITORING OF SERVICE PLAN

After a six-week period the Administrator will meet with the resident to assess the appropriateness and resident satisfaction with the service plan.

I. RE-CERTIFICATION OF LEVEL OF INDEPENDENCE

The contracted Health Care providers will perform annual reassessments when the resident's situation requires the evaluation.

The Health Care Provider will provide the Administration with a determination as to what level of independence has been established for the resident as well as mandatory needs for basic services in order to live safely in an independent environment.

J. RESIDENT APPEAL/HEARING PROCESS

A professional oversight committee (POC) will be selected to hear and resolve grievances relating to the resident's determined level of independence.

This involves disagreements regarding specific services deemed necessary by virtue of changed levels of independence.

The POC will formally review the Administrator's recommendation for termination of residency.

The POC will provide an appeal process for the resident who disagrees with the termination decision. The committee with its oversight responsibilities will make recommendations and referrals to the administration for follow-up.

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The POC will be composed of persons representing public and private interests and providing services to the facility (i.e. County Department of Social Services, County Health Council, Sutter Health Systems, Senior Omsbudsman Advisory Program, County Commission on Aging). The decision of the POC will be final with no appeal.

K. SAFETY/SECURITY

Safety/Security is that area of housing management that insures residents are provided with a safe environment. It includes:

1. protection against crime
2. psychological well being; and
3. personal safety

The Agency has purchased thirty (30) Lifeline units which will be connected to Sutter Hospital's emergency alert systems. The units will be assigned to Level II and III residents with exceptional needs (i.e. sensory losses, functionally impaired, cardiac or respiratory problems). Lifeline is a community based, twenty-four (24) hour emergency response program that allows people to remain safely in their housing units while still being in touch with help if needed.

The home emergency alarm unit is attached to the telephone and does not interfere with the normal use of the phone. It automatically seizes the telephone line, dials the number of the 24-hour central station and gives identifying information indicating who is having an emergency. The Lifeline client calls for help by pressing a remote control button, and then the Lifeline unit can automatically signal the need for help if the resident has been inactive for a specified period of time.

L. SIMULATION ACTIVITY

The Agency will conduct a simulation activity prior to the first resident's move-in in order to identify any problems in operational procedures and/or policies. Any necessary changes can then be made prior to accepting residents.

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FINANCIAL DATA

The management plan will involve consolidation of two positions in the Community Service Division within the Riverview Plaza Administration. It is proposed that the Chief of Community Services position will be re-classified to a Community Service/Congregate Housing Director. This will be a new position. The Personnel Director has completed a job description and has recommended a net increase in compensation of \$1,821 annually. The existing Typist Clerk I/II position in the Community Service Administration will be reclassified to a Housing Management Clerk I. Since seventy-five percent (75%) of the time of the Chief of Community Service position in the new classification will be spent in Riverview Plaza administration, it was deemed advisable to reclassify the Program Analyst to Assistant Chief of Community Service. As a result of the consolidation of the proposed plan a savings of \$53,512 will occur in the 1988 Community Services Budget.

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ANALYSIS COST SAVINGS 1988 BUDGET

	<u>Base Salary</u>	<u>Benefits(32.13%)</u>
1. Chief of Community Services	\$47,777	15,351
Total Budget Amount	63,128	
*Net Savings	47,346	
2. Typist Clerk II	18,669	5,998
**Total Budget Amount	24,667	
Housing Management Clerk I	18,669	5,998
***Total Budget Amount	24,667	
Transfer effective September 1, 1988. Net Savings in CSA Budget	\$ 6,166	
Total Savings	\$53,512	

*75% of salary is budgeted in Riverview Plaza for Community Services/Congregate Housing Director

**Total budgeted amount in Community Services Administration

***Total budgeted in Riverview Plaza

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ENVIRONMENTAL REVIEW

In accordance with the National Environmental Protection Act (NEPA), this is an exempt activity under Section 58.34(a)(9)(ii). The services affect only the social or economic environment.

POLICY IMPLICATIONS

Adoption of this management plan will enable the Agency to carry out efficiently and effectively the day-to-day operation and management of the Riverview Plaza Housing Project.

VOTE AND RECOMMENDATION OF COMMISSION

At its regular meeting of August 15, 1988, the Sacramento Housing and Redevelopment Commission recommended adoption of the attached resolution. The votes were as follows:

- AYES: Amundson, Pettit, Simon, Simpson, Strong, Wiggins, Wooley, Moose
- NOES: None
- ABSENT: Sheldon, Yew

RECOMMENDATION

Staff recommends the adoption of the attached resolution which authorizes implementation of the management plan. Staff also recommends the approval of two new classifications, Community Services/Congregate Housing Director and Assistant Chief of Community Services.

Respectfully submitted,

William H. Edgar

WILLIAM H. EDGAR
Executive Director

TRANSMITTAL TO COUNCIL:

Walter J. Slupe

WALTER J. SLUPE
City Manager

Contact Person: John Bridges

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RESOLUTION NO. 88-041

ADOPTED BY THE HOUSING AUTHORITY OF THE CITY OF SACRAMENTO

ON DATE OF

August 23, 1988



RESOLUTION APPROVING MANAGEMENT PLAN FOR RIVERVIEW PLAZA PROJECT

BE IT RESOLVED BY THE HOUSING AUTHORITY OF THE CITY OF SACRAMENTO:

Section 1: The Executive Director is authorized to implement the Management Plan in accordance with Exhibits A and B attached hereto.

Section 2: The Executive Director is authorized to establish two new classifications at the salaries stated in the staff report for this resolution:

- a. Community Services/Congregate Housing Director, and
- b. Assistant Chief of Community Services

Section 3: The 1988 budget will be amended to reflect these changes. There will be no dollar amount increase.

CHAIR

ATTEST:

SECRETARY

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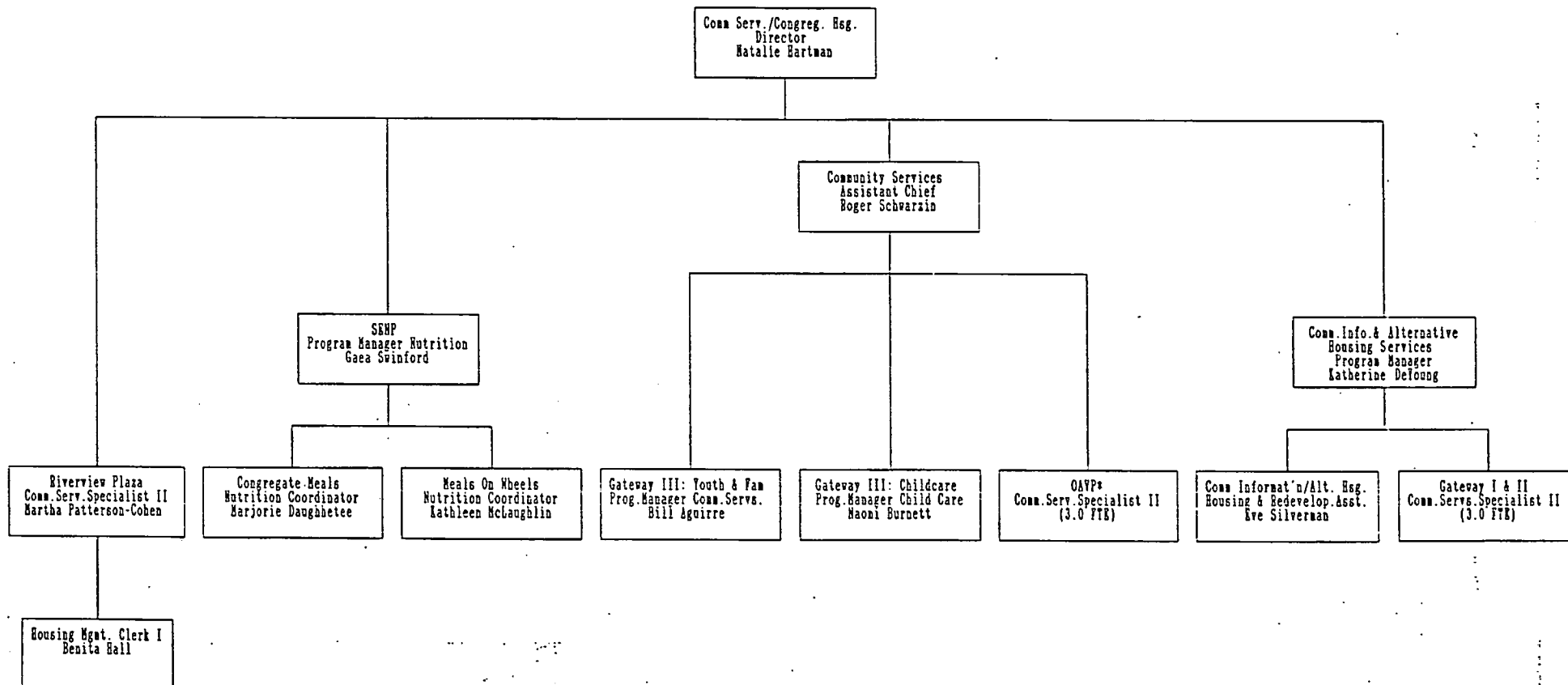
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COMMUNITY SERVICES & CONGREGATE HOUSING

CSD 8/8/88
Riverview Plaza

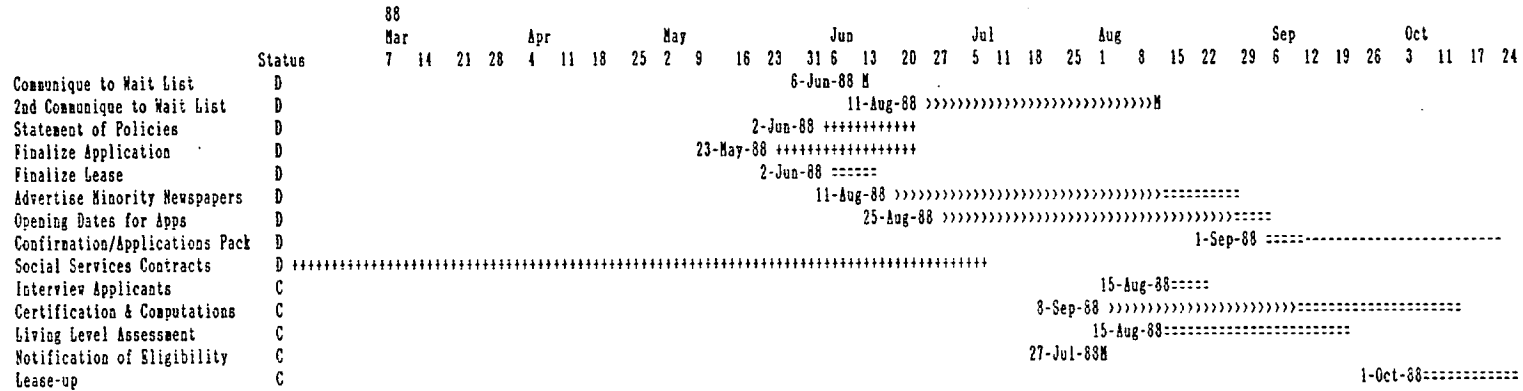
EXHIBIT A
Community Services



* Foster Grandparents Program
Senior Companion Program
Retired Senior Volunteer Program

EXHIBIT B

Schedule Name: Riverview Plaza Application Schedule
Project Manager: Natalie Hartman
As of date: 11-Aug-88 9:05am Schedule File: C:\TLDATA\RVPAPPS



D Done --- Task - Slack time (---), or
C Critical +++ Started task Resource delay (---)
S Resource conflict M Milestone > Conflict
p Partial dependency
Scale: Each character equals 1 day

TIME LINE Gantt Chart Report
Strip 1