

## STANISLAUS COUNTY IHSS ADVISORY COMMITTEE MEETING MINUTES

03/22/02

|                            |  |   |
|----------------------------|--|---|
| Committee Members Present: | Madelyn Amaral<br>Kenny Brown<br>Connie Muller | Bonnie Cyphers<br>Jose Acosta<br>Dwight Bateman |
| Committee Members Absent:  | Jeff Lambaren                                  |   |
| IHSS Staff Present:        | Jan Holden<br>Larry Baptista                   | Paul Birmingham                                 |
| CSA Staff Present:         | Tom Snow                                       | Shannon Jantz                                   |

### OPENING REMARKS by Co-CHAIRMAN KENNY BROWN

- Meeting called to order at 1:07 pm.
- Announcement made allowing for public comment. No public comment presented.

### ACCEPTANCE OF MINUTES

- March 8, 2002 minutes: Motion M/S/A to accept minutes with no corrections.

### MEMBERSHIP UPDATE

- Paul Birmingham updated the committee about new prospective member Ora Scruggs. She has accepted and her name will also be submitted to the Board of Supervisors for approval.
- Rose Martin and Toni Hector, who are also new prospective members, attended the meeting as public attendees
- Board Agenda item for three new members tentatively set for Tuesday, April 9, 2002.

### CLERICAL SUPPORT

- Jan Holden introduced Larry Baptista as the new clerical support for this committee.
- Contact phone number for Larry Baptista: (209) 558-3428
- Shannon Jantz will continue to help if/when Larry is gone or absent.
- Jan Holden answered Jeff Lambaren's question about carrying over current funds into the next fiscal year. The answer was no. The funds cannot be carried over.

### BUDGET UPDATE

- IHSS Advisory Committee Budget was handed out.
- Explained estimated expenses and what the committee can use the funds for.

## **INTRODUCTION OF ATTENDEES**

- Round table introduction of attendees including two new prospective committee members Rose Martin and Toni Hector, and the new clerical assistant Larry Baptista. Also in attendance was Denise Blasingame who is a field representative for Stanislaus County Supervisor Ray Simon.

## **RECAP OF PUBLIC AUTHORITY MODE & NON PROFIT CONSORTIUM by JAN HOLDEN**

- Jan Holden recapped the Public Authority Mode & Non Profit Consortium. What they are and the rate structures.
- Dwight Bateman suggested the Committee have a make-up day to review what has been presented so far; for new and current committee members. Recommended a Thursday as a make-up day. Committee agreed on recommendation.
- Dwight Bateman suggested the committee have a visual graph/picture of how the different modes of service might look.
- Dwight Bateman stated that someone from another county had told him that the Committee had already made a decision regarding "Employer of Record."
- Paul Birmingham said County staff had also heard that and had called the California Department of Social Services (CDSS) to inform them that the Committee had made no decision. Paul will provide copies of the latest survey sent to CDSS regarding County progress on implementing AB 1682.
- Passed out handout of other counties Public Authority's Governing Boards.
- Madelyn Amaral asked if the Board of Supervisors picks the Freestanding Board? The Board of Supervisors will solicit recommendations of qualified members of either the governing board of the Public Authority or any advisory committee. There is always consumer input.
- Jan Holden will check with the State regarding the need for 2 - non-profit organizations to apply for the RFP in the Non Profit Consortium.

## **UPDATE ON PUBLIC AUTHORITY COSTS by JAN HOLDEN**

- Passed out copies of other counties' Public Authority Budgets. The counties included San Joaquin, Sacramento, San Diego, and Contra Costa.
- Discussed each counties information and how they compare/vary.
- Distributed Stanislaus County's current budget report for the IHSS program, comparing current costs to the projected cost of a Public Authority in Stanislaus Country.

- Useful and informative packet handed out about IHSS Providers from California Department of Social Services website.

## **UPDATE ON VISIT TO PUBLIC AUTHORITY COUNTY**

- The visit will be to San Francisco County on Friday, April 12, 2002.
- Lunch will be provided and menus were given to committee members. Will check on other lunch alternatives for some committee members.
- The Committee recommended leaving from town by 7am and leaving San Francisco no later than 2pm.
- Discussed leaving from Modesto Centre Plaza parking lot. Larry Baptista will check to see if parking lot is available for parking all day.
- Tour with Public Authority will be from 10am-12:30pm. Tour will include presentation and Q/A period.
- Dwight Bateman suggested that Larry Baptista check with Brian at Medi-Van about transportation. Also mentioned using the County van with lift to accommodate some members.

- Jose Acosta let the committee know that he does not have means of transportation and will need to be picked up.
- Copies of a letter from the San Francisco Public Authority and information from their website was distributed.

### **COMMUNITY PRESENTATIONS**

- Board wants to conduct educational and informative/feedback forums for the public and community.
- Need to find ways to advertise the meetings either by Cable TV, radio, or mailing flyers. Also by noting the event on IHSS provider time sheets.
- Motion M/S/A to conduct informative forums to educate the public and community.
- The Committee agreed upon Turlock as a central site to conduct the first forum.
- The Committee needs to research availability of where and when we can have the forum meetings.

### **QUESTIONS AND ANSWERS**

- Connie Muller asked if IHSS provides landscape/yard work. IHSS does not provide that type of service.

Meeting Adjourned @ 2:45 pm  
Larry Baptista, Recorder

# **PUBLIC AUTHORITY GOVERNING BOARD**

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## **BOARD OF SUPERVISORS**

ALAMEDA COUNTY

CONTRA COSTA COUNTY

SACRAMENTO COUNTY

SAN MATEO COUNTY

SANTA CLARA COUNTY

SONOMA COUNTY

YOLO COUNTY

## **FREE-STANDING BOARD**

LOS ANGELES COUNTY

MONTEREY COUNTY

SAN FRANCISCO COUNTY

# In-home Supportive Services



**IHSS Providers  
Characteristics of  
Caregivers in the  
In-Home Supportive  
Services Program**



**CDSS**  
CALIFORNIA  
DEPARTMENT OF  
SOCIAL SERVICES

California Department of Social Services  
Research and Development Division  
Data Analysis and Publications Branch  
Adult Programs Analysis Team

October 2001

# **IHSS Providers**

## **Characteristics of Caregivers in the In Home Supportive Services Program**

**Study Month  
October 2000**



Research and Development Division

Prepared by  
California Department of Social Services  
Data Analysis and Publications Branch

Questions regarding the content of  
this publication should be addressed to:

Gretchen Berg  
Research Analyst  
Adult Programs Analysis Team  
Data Analysis and Publications Branch  
(916) 653-2800  
[gretchen.berg@dss.ca.gov](mailto:gretchen.berg@dss.ca.gov)

or

Susan Farrar  
Manager  
Adult Programs Analysis Team  
Data Analysis and Publications Branch  
(916) 657-4425  
[susan.farrar@dss.ca.gov](mailto:susan.farrar@dss.ca.gov)

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## **Background**

The In-Home Supportive Services (IHSS) program provides an alternative to out-of-home care, by providing state, county and federal funding that enables program recipients to hire a caregiver. Individuals eligible for IHSS services are disabled, age 65 or older, or blind and unable to live safely at home without help and financially unable to purchase needed services. All SSI/SSP recipients are eligible for IHSS benefits if they demonstrate an assessed need for IHSS services.

Through a series of evaluations performed by county social workers, IHSS recipients can be authorized for up to 283 hours per month of services. Services include housecleaning, meal preparation, laundry, grocery shopping, personal care services (such as bowel and bladder care, bathing, grooming, paramedical services, accompaniment to medical appointments, and protective supervision for individuals whose mental status or cognitive functioning poses a threat to their safety and well-being).

IHSS recipients have the right to choose, hire, train and terminate the employment of their IHSS provider. The provider can be a friend or family member, or a person unknown to the recipient prior to the working relationship. About two-thirds of the IHSS caseload resides in a county with an IHSS Public Authority. IHSS Public Authorities have a legal responsibility to maintain an IHSS provider registry and to operate a provider referral system for IHSS recipients who need help obtaining a provider. Public authorities must also provide access to training for IHSS providers and recipients. In counties without a Public Authority, IHSS recipients may be able to get help in locating potential providers (who are not a friend or family) through their IHSS caseworker or county social services office.

## **Purpose**

The last IHSS report from the Department of Social Services was published May 1991. Data for May 1990 were collected via an IHSS Characteristics Survey and the Case Management, Information and Payrolling System (CMIPS) database. That publication focused on IHSS recipients and contained scant IHSS provider information.

This report is the first of its kind to analyze data on the IHSS provider population. The purpose of this report is to examine available information and gain insight into the characteristics of persons employed as caregivers to IHSS recipients. The data presented in this publication can be used when considering questions about the IHSS provider workforce, including the following emerging issues in the adult-care policy debate.

- The elderly and disabled populations are increasing each year, contributing to significant growth in California's IHSS caseloads. Projections indicate the demand for providers may be far greater than the supply in coming years.
- Recent state and federal public policy initiatives attempt to maintain elderly and disabled persons in community-based settings. IHSS providers play an important part in keeping this population out of institutional care.
- National attention has focused on issues of recruiting and retaining home and community-based care providers. Competition for workers will likely increase demand for higher wages and benefits.

## **Data Sources and Limitations**

Unless specifically noted, data used in this analysis came from the following source:

- Department of Social Services  
Case Management, Information and Payrolling System (CMIPS), October 2000

Other resources used, with appropriate footnotes throughout this report, are:

- Department of Finance  
Historical, Current, and Projected Population Data, 1970 through 2040
- Employment Development Department  
Unemployment and Disability Insurance Base Wage File, 4<sup>th</sup> Quarter 2000

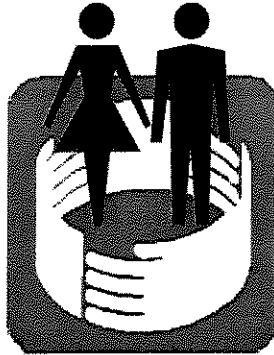
IHSS Provider Social Security Numbers drawn from the Case Management Information and Payrolling System were matched to the Employment Development Department, Unemployment and Disability Insurance Base Wage File to determine wages earned.

- Department of Health Services  
Medi-Cal Eligibility Data System (MEDS), 4<sup>th</sup> Quarter 2000

IHSS Provider Social Security Numbers drawn from the Case Management Information and Payrolling System were matched to the Department of Health Services Medi-Cal Eligibility Data System to determine whether or not a provider received Medi-Cal benefits.

There were 202,090 providers eligible to work during October 2000. (In the 3 months comprising the fourth quarter of 2000, there was a total of 218,825 providers.) There were also 243,060 recipients eligible to receive IHSS services in October 2000. Given that one provider can work for multiple recipients, and one recipient can employ multiple providers, there were a total of 245,498 'relationships', representing the connections between all providers and all recipients.

Data for ethnicity and primary language, while purportedly available in the database, are unreliable.

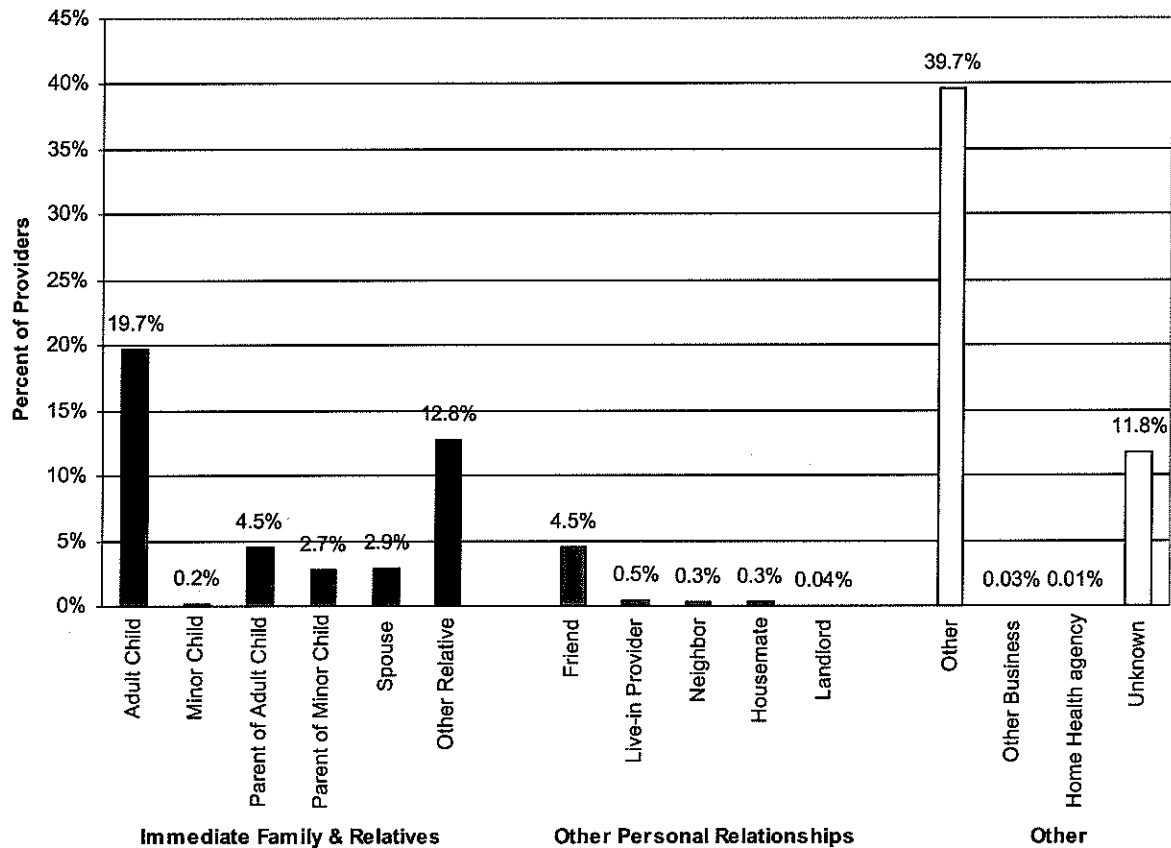


### Summary of Findings

- Just over 40 percent of IHSS providers are relatives of the recipient.
- About half of all providers are between ages 41 and 60.
- 75 percent of providers work for just one recipient, and about 60 percent work 23 hours or fewer per week at their IHSS job.
- One quarter of all providers hold jobs outside of IHSS.
- Few IHSS providers receive Medi-Cal, SSI/SSP or CalWORKs.
- The current ratio of recipients to providers in California is roughly 1.2 to 1. Our estimates show that by the year 2020, the ratio will likely increase to 1.4, and by 2040 may further increase to 1.8 to 1.

## Over 40 Percent of Providers are Members of the Immediate Family or a Relative of the IHSS Recipient

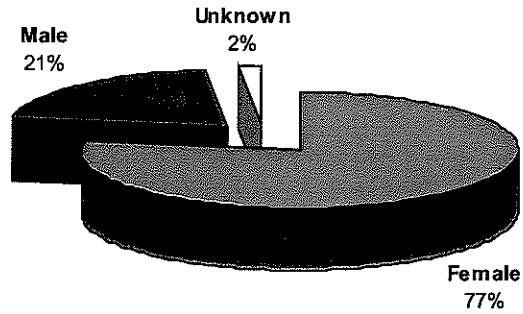
*Relationship of IHSS Provider to IHSS Recipient  
California, October 2000*



- This chart contains duplicated provider records to account for each of the 245,498 provider-to-recipient relationships. (See page 10, which shows that about one quarter of providers work for multiple recipients.)
- 43 percent (105,291) of the total relationships are between immediate family or relatives. 6 percent (13,755) are between individuals with another type of personal relationship. 51 percent (the 126,452 remaining relationships) are based on another type of business relationship, or is unknown.
- Female and male providers have the same pattern of relationships to the recipients for whom they work.

## Most Providers are Women

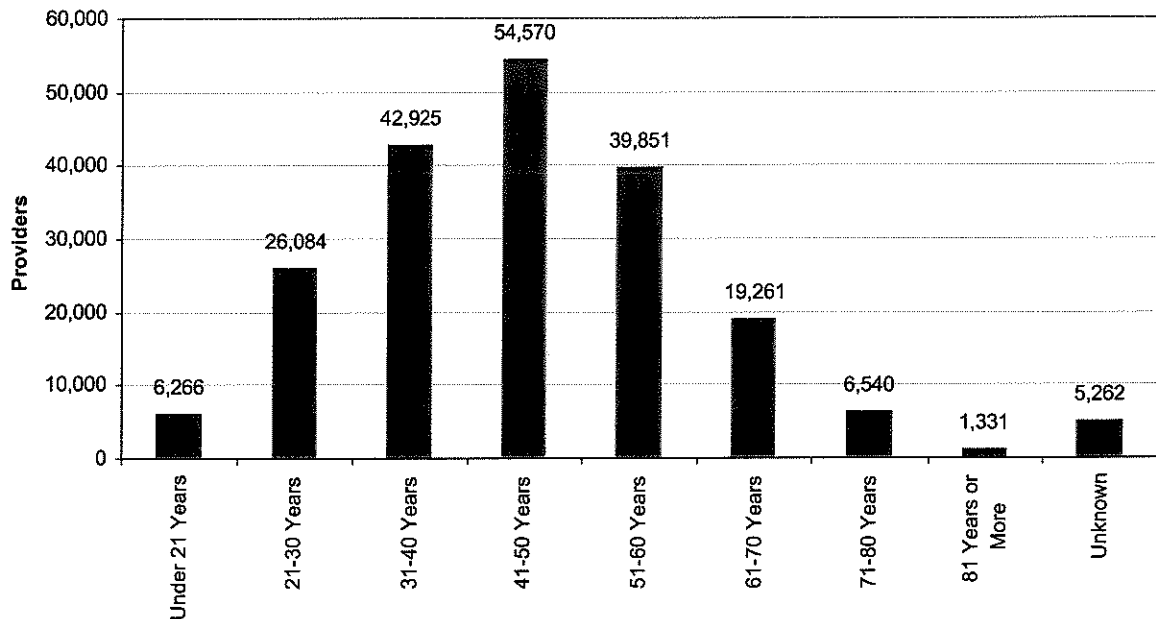
*Gender of IHSS Providers  
California, October 2000*



## About Two-Thirds of All Providers are Between Ages 31 and 60

*Age of IHSS Providers  
California, October 2000*

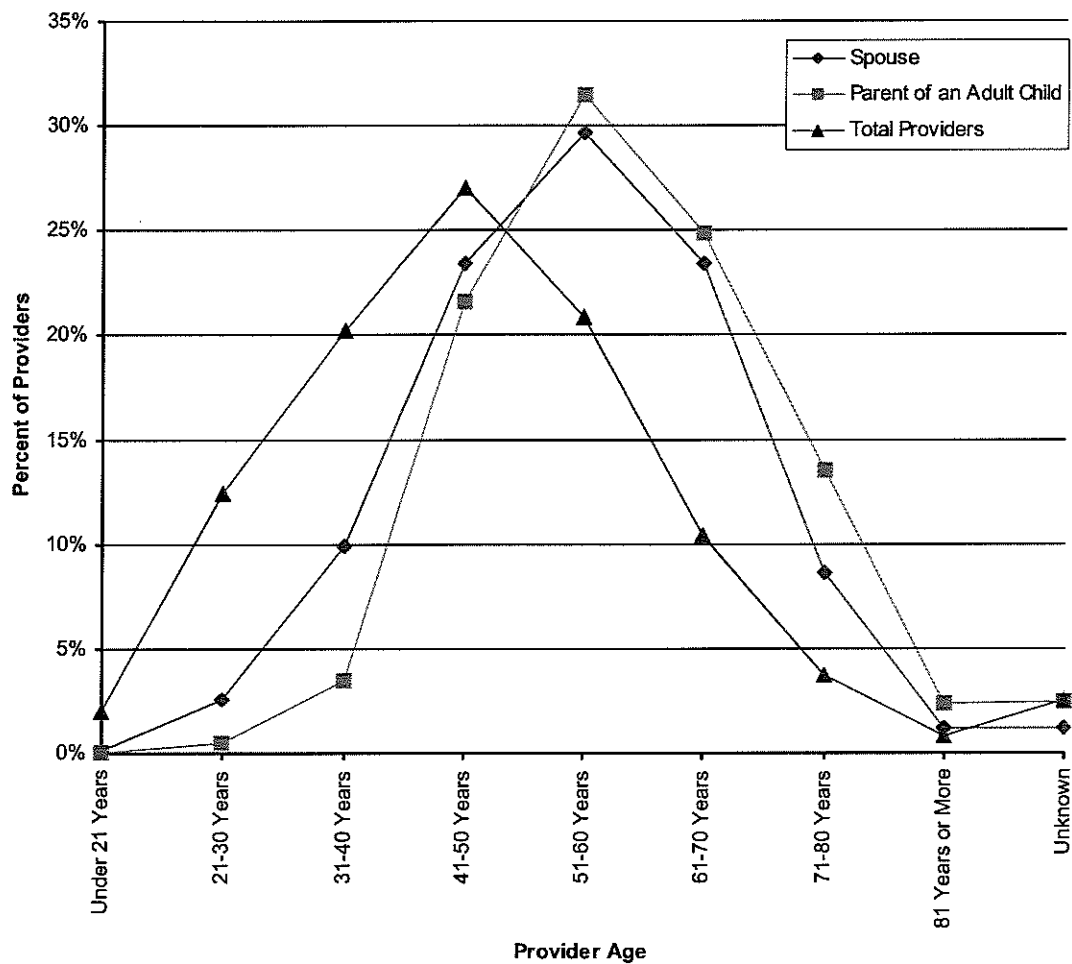
- For comparison, about two-thirds of all recipients are age 61 or over.



- Ages in the category 'Unknown' represent invalid and questionable date-of-birth information.

## Providers Who Are Either a Spouse of a Recipient or the Parent of an Adult Child Recipient Tend to be Older than Other Providers

*Age of Spouse and Parent Providers Compared to All IHSS Providers  
California, October 2000*



## The Northern Region Has a Greater Proportion of IHSS Providers Compared to the Total Population than Valley Mountain, Central or Southern Regions

California, October 2000



Map ratios depict the average number of IHSS providers per 1,000 persons in the population by region.



County Population<sup>1</sup> Compared to the IHSS Provider Population  
California, October 2000

**Northern Region**

|                  | Total<br>Population | Percent of<br>Statewide<br>Total | Total<br>Providers | Percent of<br>Provider<br>Total | Ratio of<br>Providers to<br>County<br>Population |
|------------------|---------------------|----------------------------------|--------------------|---------------------------------|--|
| <i>Alpine</i>    | 1,239               | 0.0%                             | 9                  | 0.0%                            | 7 in 1,000                                       |
| <i>Butte</i>     | 207,158             | 0.6%                             | 1,868              | 0.9%                            | 9 in 1,000                                       |
| <i>Colusa</i>    | 20,973              | 0.1%                             | 118                | 0.1%                            | 6 in 1,000                                       |
| <i>Del Norte</i> | 31,155              | 0.1%                             | 285                | 0.1%                            | 9 in 1,000                                       |
| <i>El Dorado</i> | 163,197             | 0.5%                             | 459                | 0.2%                            | 3 in 1,000                                       |
| <i>Glenn</i>     | 29,298              | 0.1%                             | 290                | 0.1%                            | 10 in 1,000                                      |
| <i>Humboldt</i>  | 128,419             | 0.4%                             | 1,809              | 0.9%                            | 14 in 1,000                                      |
| <i>Lake</i>      | 60,072              | 0.2%                             | 1,562              | 0.8%                            | 26 in 1,000                                      |
| <i>Lassen</i>    | 35,959              | 0.1%                             | 126                | 0.1%                            | 4 in 1,000                                       |
| <i>Modoc</i>     | 10,481              | 0.0%                             | 177                | 0.1%                            | 17 in 1,000                                      |
| <i>Nevada</i>    | 97,020              | 0.3%                             | 940                | 0.5%                            | 10 in 1,000                                      |
| <i>Placer</i>    | 243,646             | 0.7%                             | 669                | 0.3%                            | 3 in 1,000                                       |
| <i>Plumas</i>    | 20,852              | 0.1%                             | 196                | 0.1%                            | 9 in 1,000                                       |
| <i>Shasta</i>    | 175,777             | 0.5%                             | 1,518              | 0.8%                            | 9 in 1,000                                       |
| <i>Sierra</i>    | 3,457               | 0.0%                             | 86                 | 0.0%                            | 25 in 1,000                                      |
| <i>Siskiyou</i>  | 45,194              | 0.1%                             | 691                | 0.3%                            | 15 in 1,000                                      |
| <i>Sutter</i>    | 82,040              | 0.2%                             | 314                | 0.2%                            | 4 in 1,000                                       |
| <i>Tehama</i>    | 56,666              | 0.2%                             | 571                | 0.3%                            | 10 in 1,000                                      |
| <i>Trinity</i>   | 13,490              | 0.0%                             | 231                | 0.1%                            | 17 in 1,000                                      |
| <i>Yuba</i>      | 63,983              | 0.2%                             | 583                | 0.3%                            | 9 in 1,000                                       |
|                  | 1,490,076           | 4.3%                             | 12,502             | 6.2%                            | 7 in 1,000                                       |

**Valley Mountain Region**

|                    | Total<br>Population | Percent of<br>Statewide<br>Total | Total<br>Providers | Percent of<br>Provider<br>Total | Ratio of<br>Providers to<br>County<br>Population |
|--------------------|---------------------|----------------------------------|--------------------|---------------------------------|--|
| <i>Amador</i>      | 34,853              | 0.1%                             | 169                | 0.1%                            | 5 in 1,000                                       |
| <i>Calaveras</i>   | 42,041              | 0.1%                             | 301                | 0.1%                            | 7 in 1,000                                       |
| <i>Fresno</i>      | 811,179             | 2.3%                             | 8,847              | 4.4%                            | 11 in 1,000                                      |
| <i>Inyo</i>        | 18,437              | 0.1%                             | 76                 | 0.0%                            | 4 in 1,000                                       |
| <i>Kings</i>       | 126,672             | 0.4%                             | 881                | 0.4%                            | 7 in 1,000                                       |
| <i>Madera</i>      | 126,394             | 0.4%                             | 836                | 0.4%                            | 7 in 1,000                                       |
| <i>Mariposa</i>    | 16,762              | 0.0%                             | 253                | 0.1%                            | 15 in 1,000                                      |
| <i>Merced</i>      | 215,256             | 0.6%                             | 1,539              | 0.8%                            | 7 in 1,000                                       |
| <i>Mono</i>        | 10,891              | 0.0%                             | 31                 | 0.0%                            | 3 in 1,000                                       |
| <i>San Benito</i>  | 51,853              | 0.1%                             | 185                | 0.1%                            | 4 in 1,000                                       |
| <i>San Joaquin</i> | 579,712             | 1.7%                             | 2,861              | 1.4%                            | 5 in 1,000                                       |
| <i>Stanislaus</i>  | 459,025             | 1.3%                             | 3,097              | 1.5%                            | 7 in 1,000                                       |
| <i>Tulare</i>      | 379,944             | 1.1%                             | 1,851              | 0.9%                            | 5 in 1,000                                       |
| <i>Tuolumne</i>    | 56,125              | 0.2%                             | 159                | 0.1%                            | 3 in 1,000                                       |
| <i>Yolo</i>        | 164,010             | 0.5%                             | 648                | 0.3%                            | 4 in 1,000                                       |
|                    | 3,093,154           | 8.9%                             | 21,734             | 10.8%                           | 5 in 1,000                                       |

<sup>1</sup> State of California, Department of Finance, *Race/Ethnic Population with Age and Sex Detail, 1970-2040*

## Central Region

|                      | Total<br>Population | Percent of<br>Statewide<br>Total | Total<br>Providers | Percent of<br>Provider<br>Total | Ratio of<br>Providers to<br>County<br>Population |
|----------------------|---------------------|----------------------------------|--------------------|---------------------------------|--|
| <i>Alameda</i>       | 1,470,155           | 4.2%                             | 8,552              | 4.2%                            | 6 in 1,000                                       |
| <i>Contra Costa</i>  | 931,946             | 2.7%                             | 4,084              | 2.0%                            | 4 in 1,000                                       |
| <i>Marin</i>         | 248,397             | 0.7%                             | 832                | 0.4%                            | 3 in 1,000                                       |
| <i>Mendocino</i>     | 90,442              | 0.3%                             | 1,134              | 0.6%                            | 13 in 1,000                                      |
| <i>Monterey</i>      | 401,886             | 1.2%                             | 1,784              | 0.9%                            | 4 in 1,000                                       |
| <i>Napa</i>          | 127,084             | 0.4%                             | 408                | 0.2%                            | 3 in 1,000                                       |
| <i>Sacramento</i>    | 1,212,527           | 3.5%                             | 9,196              | 4.6%                            | 8 in 1,000                                       |
| <i>San Francisco</i> | 792,049             | 2.3%                             | 7,664              | 3.8%                            | 10 in 1,000                                      |
| <i>San Mateo</i>     | 747,061             | 2.2%                             | 1,834              | 0.9%                            | 2 in 1,000                                       |
| <i>Santa Clara</i>   | 1,763,252           | 5.1%                             | 3,669              | 1.8%                            | 2 in 1,000                                       |
| <i>Santa Cruz</i>    | 260,248             | 0.8%                             | 1,004              | 0.5%                            | 4 in 1,000                                       |
| <i>Solano</i>        | 399,841             | 1.2%                             | 1,930              | 1.0%                            | 5 in 1,000                                       |
| <i>Sonoma</i>        | 459,258             | 1.3%                             | 2,179              | 1.1%                            | 5 in 1,000                                       |
|                      | 8,904,146           | 25.7%                            | 44,270             | 21.9%                           | 4 in 1,000                                       |

## Southern Region

|                        | Total<br>Population | Percent of<br>Statewide<br>Total | Total<br>Providers | Percent of<br>Provider<br>Total | Ratio of<br>Providers to<br>County<br>Population |
|------------------------|---------------------|----------------------------------|--------------------|---------------------------------|--|
| <i>Imperial</i>        | 154,549             | 0.4%                             | 1,938              | 1.0%                            | 13 in 1,000                                      |
| <i>Kern</i>            | 677,372             | 2.0%                             | 3,250              | 1.6%                            | 5 in 1,000                                       |
| <i>Los Angeles</i>     | 9,838,861           | 28.4%                            | 83,244             | 41.2%                           | 8 in 1,000                                       |
| <i>Orange</i>          | 2,833,190           | 8.2%                             | 5,211              | 2.6%                            | 2 in 1,000                                       |
| <i>Riverside</i>       | 1,570,885           | 4.5%                             | 5,783              | 2.9%                            | 4 in 1,000                                       |
| <i>San Bernardino</i>  | 1,727,452           | 5.0%                             | 8,273              | 4.1%                            | 5 in 1,000                                       |
| <i>San Diego</i>       | 2,943,001           | 8.5%                             | 11,618             | 5.7%                            | 4 in 1,000                                       |
| <i>San Luis Obispo</i> | 254,818             | 0.7%                             | 977                | 0.5%                            | 4 in 1,000                                       |
| <i>Santa Barbara</i>   | 412,071             | 1.2%                             | 1,728              | 0.9%                            | 4 in 1,000                                       |
| <i>Ventura</i>         | 753,820             | 2.2%                             | 1,562              | 0.8%                            | 2 in 1,000                                       |
|                        | 21,166,019          | 61.1%                            | 123,584            | 61.2%                           | 4 in 1,000                                       |

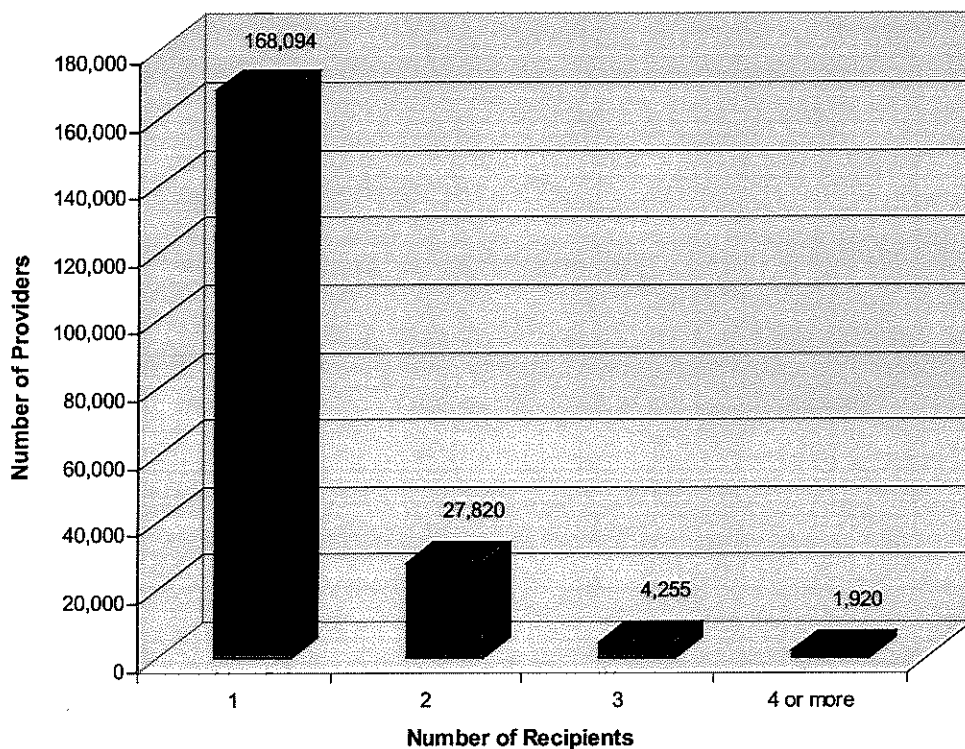
## Statewide

|                   | Total<br>Population | Percent of<br>Statewide<br>Total | Total<br>Providers | Percent of<br>Provider<br>Total | Ratio of<br>Providers to<br>State<br>Population |
|-------------------|---------------------|----------------------------------|--------------------|---------------------------------|---|
| <i>California</i> | 34,653,395          | 100%                             | 202,090            | 100%                            | 6 in 1,000                                      |

- The ratio of recipients to the county population is very similar to the ratio shown of providers to the county population.
- 77 percent of counties in the Central region, 80 percent of counties in the Southern region, and 53 percent of counties in the Valley Mountain region have a provider to general population ratio lower than the statewide average. Counties in the Northern region have a higher ratio of providers to the general population.

## Most Providers Work for Only One IHSS Recipient

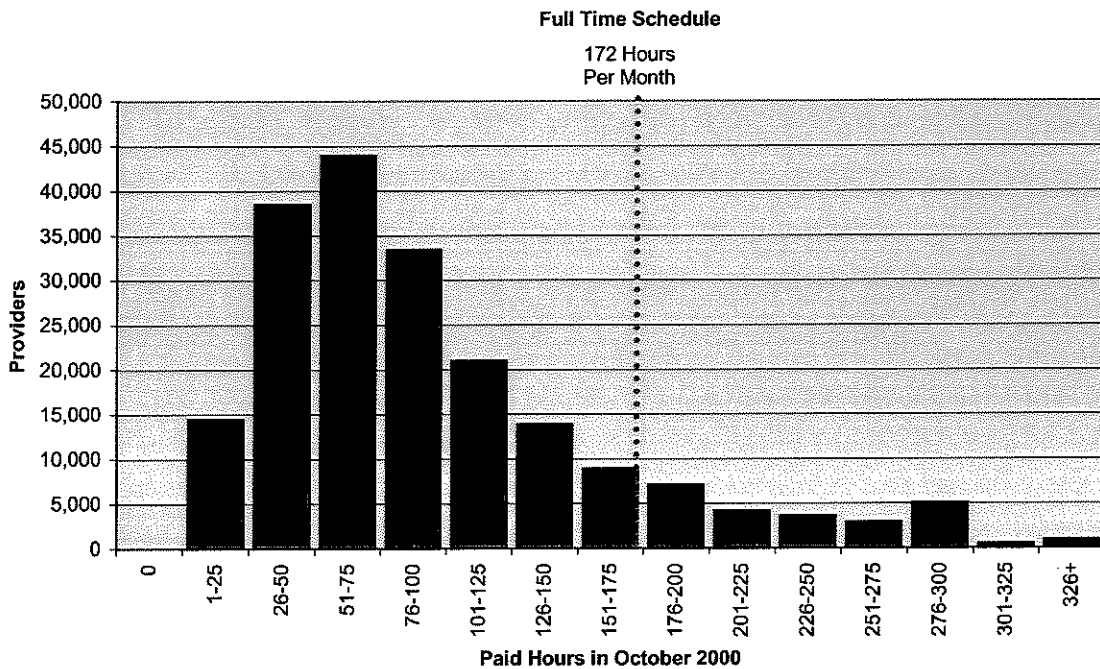
*Number of Recipients for Whom an IHSS Provider Works  
California, October 2000*



- Nearly all (96 percent) providers are 'Individual Providers,' meaning that they are employed directly by their recipient, and no outside agency is involved.
- Instances where a provider may be employed by 4 or more recipients:
  - A provider who provides services to several recipients living in a shared living arrangement.
  - One provider who provides services, such as grocery shopping, to several housebound seniors through a local community organization.

## Most Providers Work Between 6 and 23 Hours Per Week

Monthly Hours Paid to IHSS Providers<sup>2</sup>  
California, October 2000

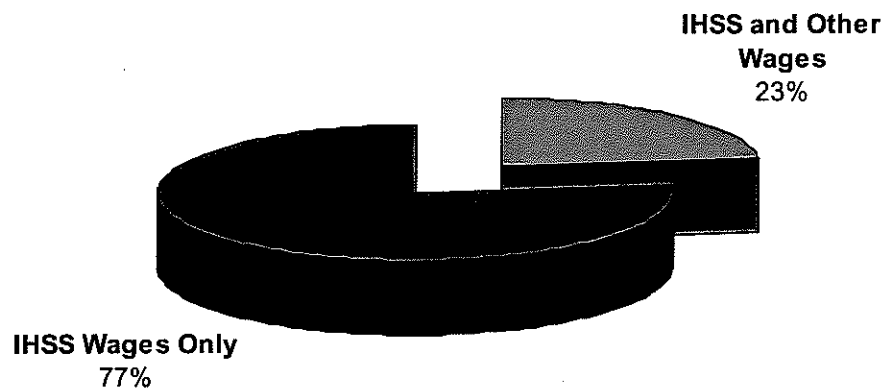


- 13 percent of providers worked a full time schedule (40 hour work week is equivalent to 172 hours per month). 87 percent of providers worked less than a full time schedule.
- The maximum amount of service hours allowed for most recipients is 283 hours per month.
- Providers who worked in excess of 283 hours were working for 2 or more recipients.
- 19 percent of providers work between 6 and 12 hours per week (26-50 hours per month).  
22 percent of providers work between 12 and 17 hours per week (51-75 hours per month).  
17 percent of providers work between 18 and 23 hours per week (76-100 hours per month).

<sup>2</sup> Hours are actual hours paid to the provider, not hours authorized for the recipient. 198,371 providers were paid in October 2000 for services rendered in that calendar month.

## Three-Quarters of Providers Had Only IHSS Earnings During October 2000

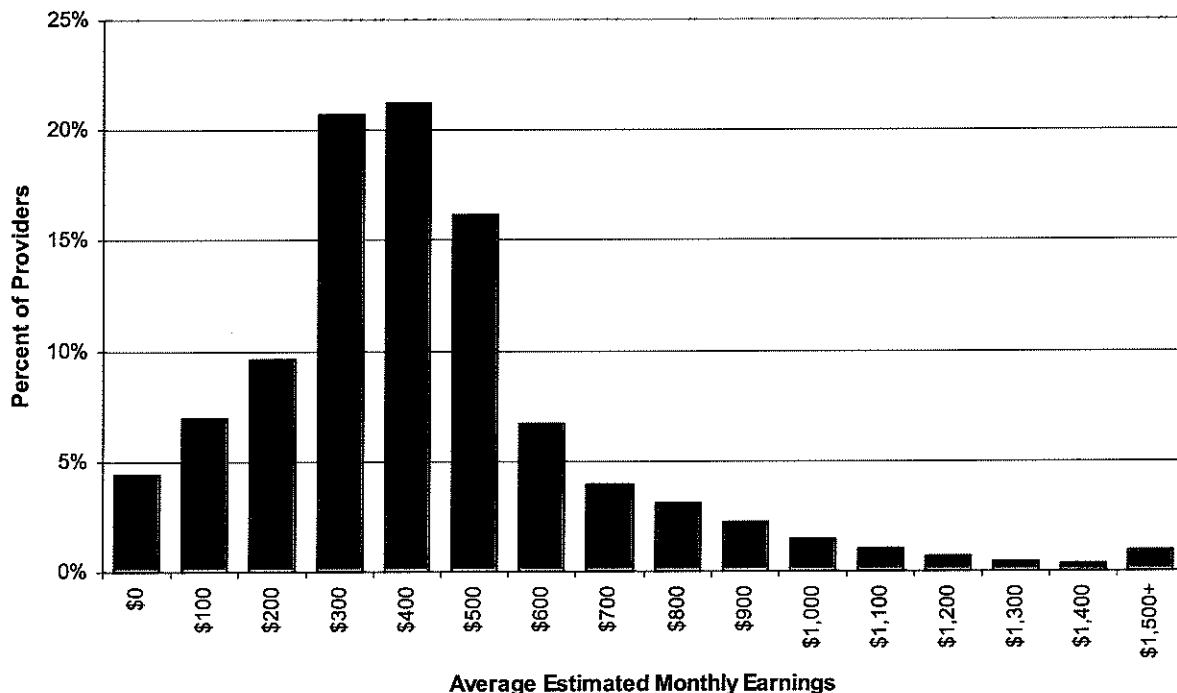
*Source of Earnings, Based on Employer Reported Earnings  
California, 4<sup>th</sup> Quarter 2000*



- 23 percent of the provider Social Security Numbers matched to EDD wage data earned IHSS wages as well as wages from another job during the 4<sup>th</sup> quarter of 2000.
- 77 percent of the provider Social Security Numbers matched to EDD wage data earned only IHSS wages during the 4<sup>th</sup> quarter of 2000.

**Three Quarters of Providers, Whose Only Source of Earnings is IHSS Wages, Earn Between \$200 and \$600 per Month – Based on Part-Time Hours (see page 12)**

*Average Estimated Monthly Earnings<sup>3</sup> for Providers Not Employed Outside of IHSS  
California, 4<sup>th</sup> Quarter 2000*



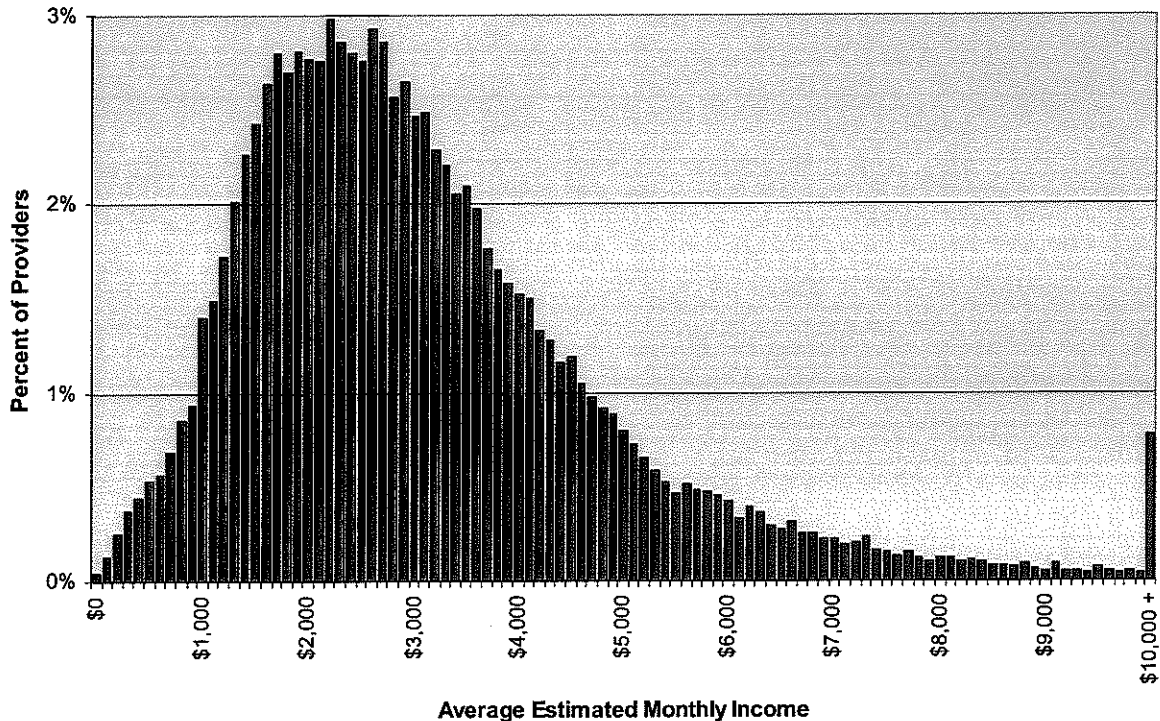
- The median monthly earnings for providers not earning wages outside of IHSS are \$436 per month.
- These data represent IHSS wages for providers only. Wages earned by other members of the household are not included because there are no data to determine household composition for providers. Other sources of income, such as CalWORKs cash grant, are not included.

Note: IHSS Provider Social Security Numbers drawn from the Case Management Information and Payrolling System were matched to the Employment Development Department Unemployment and Disability Insurance Base Wage File to determine wages earned. Of the 218,825 SSNs compared, 64,194 (29 percent) did not match the EDD data or had zero earnings in the quarter. Average estimated monthly income is calculated using a monthly average of quarterly earnings.

<sup>3</sup>State of California, Employment Development Department, Unemployment and Disability Insurance Base Wage File, 4<sup>th</sup> Quarter 2000

## Three Quarters of Providers, Who Have Earnings in Addition to Their IHSS Wages, Earn Between \$1,000 and \$4,000 per Month

*Average Estimated Monthly Income<sup>4</sup> for Providers Earning Wages in Addition to their IHSS Wages  
California, 4<sup>th</sup> Quarter 2000*



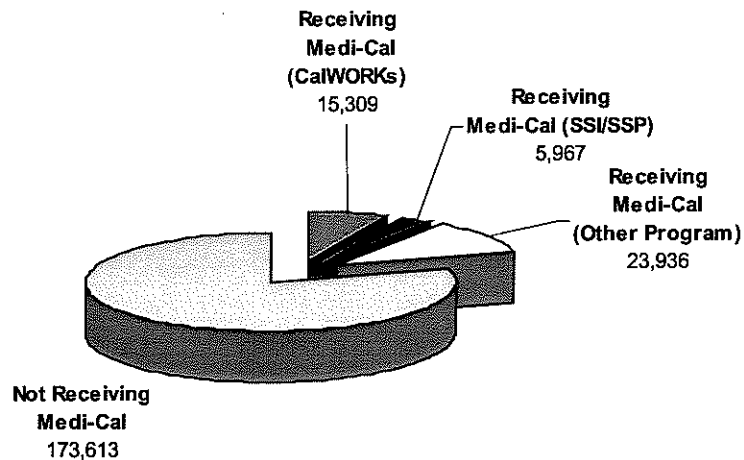
- The median monthly earnings for providers earning wages in addition to IHSS wages are \$1,870 per month.

Note: IHSS Provider Social Security Numbers drawn from the Case Management Information and Payrolling System were matched to the Employment Development Department, Unemployment and Disability Insurance Base Wage File to determine wages earned. Of the 218,825 SSNs compared, 64,194 (29 percent) did not match the EDD data or had zero earnings in the quarter. Average estimated monthly income is calculated using a monthly average of quarterly earnings.

<sup>4</sup> State of California, Employment Development Department, Unemployment and Disability Insurance Base Wage File, 4<sup>th</sup> Quarter 2000

## Most Providers Are Not Receiving Medi-Cal Benefits

Medi-Cal Status<sup>5</sup> of IHSS Providers, by Type of Eligibility  
California, 4<sup>th</sup> Quarter 2000



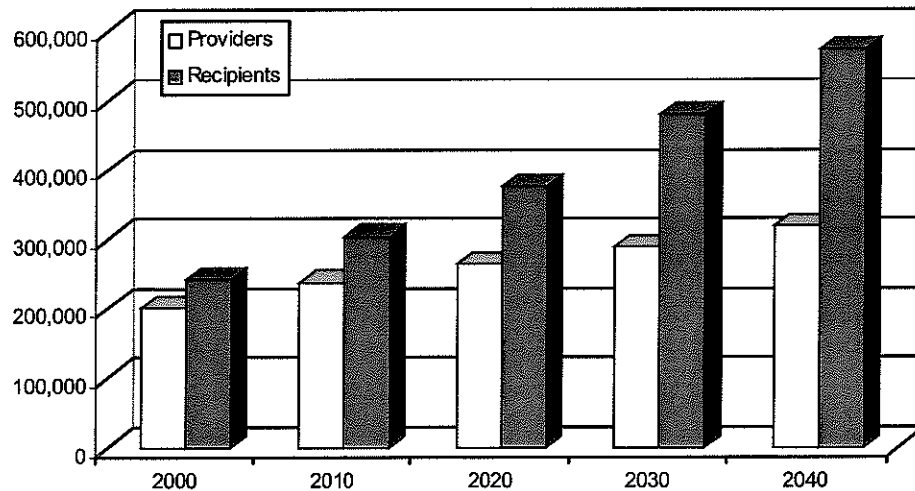
- 79 percent (173,613) of providers are not receiving Medi-Cal.
- Of the 20 percent of providers who are receiving Medi-Cal:
  - ⇒ 7 percent are CalWORKs recipients.
  - ⇒ 3 percent are SSI/SSP recipients.
  - ⇒ 11 percent are recipients of other miscellaneous programs, such as the Cash Assistance Program for Immigrants (CAPI) or have other eligibility based on the presence of a child in the home.

<sup>5</sup> State of California, Department of Health Services, Medi-Cal Eligibility Data System (MEDS), 4<sup>th</sup> Quarter 2000



## An Estimate of the Future IHSS Provider and Recipient Populations Indicates a Widening Gap Between the Two

*Approximated Future Provider and Recipient Population  
California, 2000 to 2040*



- This graph shows the projected number of IHSS recipients and providers based on the projected California population growth and the IHSS provider and recipient numbers in October 2000.
  - The projections are age adjusted (the percent of providers and recipients in each age group of the total population during October 2000 was used to determine the share of each age group in the future population). We assume that the IHSS recipient and provider population will continue to be a constant share of the overall state population.
  - These shares were then applied to each ten-year projection<sup>6</sup> of the California population to get the estimated IHSS recipient population.
- The current ratio of recipients to providers in California is roughly 1.2:1. The ratio of the projected recipient population to the projected provider population could be 1.4:1 by the year 2020, and 1.8:1 by the year 2040. Based on these projections, it appears there may be an insufficient supply of providers to meet the rising demand for services by recipients in the coming decades.

Note: For the purposes of this projection, we assume the age distribution of providers with unknown ages follow the same distribution as those with known ages.

<sup>6</sup> Projection data from: State of California, Department of Finance, *Race/Ethnic Population with Age and Sex Detail, 1970-2040*

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HEALTH AND HUMAN SERVICES AGENCY  
Grantland Johnson, Secretary

DEPARTMENT OF SOCIAL SERVICES  
Rita Saenz, Director

**SACRAMENTO COUNTY  
PUBLIC AUTHORITY BUDGET  
FY 2000/2001**

|                                | Public Authority<br>Budgeted<br>Expenses<br>7FTE |
|--------------------------------|--|
| <b>SALARIES/BENEFITS</b>       |  |
| SALARIES                       | \$ 318,502.00                                    |
| BENEFITS                       | \$ 94,095.00                                     |
| EMPLOYER PAID TAXES            | \$ 25,352.00                                     |
|                                | <b>\$ 437,949.00</b>                             |
| <b>SERVICES &amp; SUPPLIES</b> |  |
| ADVERTISING                    | \$ 15,000.00                                     |
| BOOKS/PER SUP                  | \$ 500.00  |
| BUS/CONFERENCE EXP             | \$ 3,000.00                                      |
| ED/TRAINING SVC                | \$ 15,000.00                                     |
| EMP TRANSPORTATION             | \$ 1,500.00                                      |
| INS LIABILITY                  | \$ 9,700.00                                      |
| OFFICE SUPPLIES                | \$ 2,500.00                                      |
| POSTAL SVC                     | \$ 15,000.00                                     |
| PRINTING SVC                   | \$ 8,000.00                                      |
| TELEPHONE SVC                  | \$ 6,000.00                                      |
| OFFICE EQ MAINT SUP            | \$ 10,000.00                                     |
| PERSONNEL SVC                  | \$ 5,000.00                                      |
| DATA PROCESSING SUP            | \$ 3,000.00                                      |
| LEASED PROP USE CHGS           | \$ 5,250.00                                      |
|                                | <b>\$ 99,450.00</b>                              |
| <b>OTHER COSTS</b>             |  |
| COMPUTER EQUIP & SOFTWARE      | \$ 21,000.00                                     |
| OFFICE FURNITURE               | \$ 24,000.00                                     |
|                                | <b>\$ 45,000.00</b>                              |
| <b>COUNTY SERVICES</b>         |  |
| COUNTY COUNSEL                 | \$ 1,500.00                                      |
| DEPARTMENT OF FINANCE          | \$ 1,000.00                                      |
| DHHS - FISCAL SERVICES         | \$ 5,000.00                                      |
| DHHS - SENIOR & ADULT SERVICES | \$ 5,000.00                                      |
| LABOR RELATIONS                | \$ 40,000.00                                     |
| OCIT                           | \$ 7,000.00                                      |
| RISK MANAGEMENT                | \$ 1,000.00                                      |
|                                | <b>\$ 60,500.00</b>                              |

**Total Operating Expenses    \$ 642,899.00**

Proposed  
Public Authority Annual Budget

*Control  
costs*

Exhibit 6

|  |   | Start-up<br>Year | Ongoing |
|--|---|------------------|---------|
| Salaries/Benefits                            | Exec Director 5100/mo   |                  | 61,200  |
|  | Prog Manager 4150/mo  |                  | 49,800  |
|  | Office Mgr/Clerk 3000/mo  |                  | 36,000  |
|  | Fringe Benefits @ 27%   |                  | 42,630  |
|  |   | 189,630          | 189,630 |
| Registry Operations                          | Coordinator, clerk, three regional aides and office support         | 125,000          | 125,000 |
| Labor Relations Services                     | Contract with IEDA  |                  |         |
|  | Initial Employee organization recognition and negotiation           | 45,000           |         |
|  | Ongoing Labor relations services                                    |                  | 25,000  |
|  | Human Resources Staff Liaison                                       | 35,000           | 35,000  |
|  |   | 80,000           | 60,000  |
| Liability and Workers Compensation Insurance |   | 20,000           | 20,000  |
| Provider Training                            | Train 900 providers per year (75 per month) for \$50 per session    | 45,000           | 45,000  |
|  | Provide \$25 training stipend per session to providers (900 x \$25) | 22,500           | 22,500  |
|  |   | 67,500           | 67,500  |
| Legal Services                               | 1260 hrs/yr @ 86.50/hr  |                  |         |
|  | 1000 hrs/yr @ 86.50/hr  | 109,000          |         |
|  |   |                  | 86,500  |
|  |   | 109,000          | 86,500  |
| Social Service Department Staff Liaison      | 50% Staff Asst. II \$2715/mo wages & fringes                        | 32,580           | 32,580  |
| Office Space                                 | 1200 sq ft @ \$1.50/sq ft / month                                   | 21,600           | 21,600  |
| Office Furniture                             | Desks, chairs, workstations, files & bookcases for 3 staff          | 5,000            |         |
|  | 15 tables and 30 chairs for conference room                         | 9,000            |         |
|  | Audio-visual equipment  | 500              |         |
|  |   | 14,500           |         |
| Computer Hardware & Software                 | \$4000 @ for 3 staff  | 12,000           |         |
| Accounting/Auditing                          | Annual Accounting costs   |                  |         |
|  | Annual Audit costs  | 4,000            | 4,000   |
|  |   |                  | 6,000   |
|  |   | 4,000            | 10,000  |

Exhibit 6 (Cont'd)

|   |  |        |        |
|---|--|--------|--------|
| Advisory Committee Expenses                   | Mileage reimbursement averaging \$30 per month for 11 members                    | 3,900  | 3,900  |
|   | Stationery   | 600    | 600    |
|   | Meeting refreshments & supplies for \$100/month                                  | 1,200  | 1,200  |
|   |  | 5,700  | 5,700  |
| Office Supplies                               | \$2000 initial purchase of stationery, desk supplies, etc.                       | 2,000  |        |
|   | Monthly replenishment of office supplies   | 1,650  | 1,800  |
|   |  | 3,650  | 1,800  |
| Postage                                       | Monthly mailings to 5,000 providers (\$900)                                      | 12,000 | 12,000 |
|   | Other monthly postage (\$100)  |        |        |
| Printing                                      | Informational fliers   | 6,000  | 6,000  |
|   | Training manuals - 1,000 per-year for providers                                  |        |        |
| Books, periodicals                            |  | 500    | 500    |
| Office Equipment                              | FAX purchase & installation  | 1,000  |        |
|   | Photocopy rental (\$530/month)   | 6,360  | 6,360  |
|   |  | 7,360  | 6,360  |
| Telephone                                     | 10 telephone line installation   | 1,000  |        |
|   | 10 telephones @\$50/month  | 6,000  | 6,000  |
|   |  | 7,000  | 6,000  |
| Staff mileage                                 | \$100 @ for two staff per month  | 2,400  | 2,400  |
| Staff and Advisory Council Travel/Conferences | Four attendees at conferences @ \$500  | 2,000  | 2,000  |
| Staff Training                                | Four group Facilitation Training sessions for staff and Advisory Council @ \$500 | 2,000  |        |
|   | Semi-Annual group facilitation training for staff and Advisory Council           |        | 1,000  |
|   |  | 2,000  | 1,000  |
| IT/Programming Expenses                       | 60 hours @ \$75/hr   | 4,500  |        |
|   | 30 hours @ 75/hr   |        | 2,250  |
|   |  | 4,500  | 2,250  |
| Other Professional Services                   | Consultants for needs assessment, program evaluation, event plans, etc.          |        |        |
|   | 100 hrs \$60/hr  | 6,000  |        |
|   | 50 hrs \$60/hr   |        | 3,000  |
|   |  | 6,000  | 3,000  |
| Miscellaneous Expenses                        |  | 5,000  | 5,000  |

TOTAL

739,920

666,820

**COUNTY OF SAN DIEGO  
PUBLIC AUTHORITY BUDGET**

**TABLE 1 - MANDATED HOURLY INCREASES IN IHSS**

| YEAR          | HOURLY RATE    | TOTAL COST           | COUNTY COST          |
|---------------|----------------|----------------------|----------------------|
| FY 00/01      | \$6.25*        | \$ 3,572,667         | \$ 801,706           |
| FY 01/02      | \$6.25/\$6.75* | \$ 11,223,200        | \$ 2,518,486         |
| FY 02/03      | \$ 6.75        | \$ 16,858,181        | \$ 3,782,976         |
| FY 03/04      | \$ 6.75        | \$ 18,325,331        | \$ 4,112,204         |
| FY 04/05      | \$ 6.75        | \$ 19,792,482        | \$ 4,441,433         |
| <b>TOTALS</b> |                | <b>\$ 69,771,861</b> | <b>\$ 15,656,805</b> |

Note: \*Rate increases effective 1/1/01 and 01/01/02

**TABLE 2 - POTENTIAL HOURLY INCREASES IN IHSS**

| YEAR          | HOURLY RATE | TOTAL COST**          | COUNTY COST**           |
|---------------|-------------|-----------------------|-------------------------|
| FY 00/01*     | \$ 7.50     | \$ 11,207,364         | \$ 2,514,932.48         |
| FY 01/02      | \$ 8.50     | \$ 35,648,336         | \$ 7,999,486.60         |
| FY 02/03      | \$ 9.50     | \$ 50,899,278         | \$ 11,421,797.98        |
| FY 03/04      | \$ 10.50    | \$ 73,252,351         | \$ 16,437,827.56        |
| FY 04/05      | \$ 11.50    | \$ 98,539,728         | \$ 22,112,314.96        |
| <b>TOTALS</b> |             | <b>\$ 269,547,057</b> | <b>\$ 60,486,359.58</b> |

Notes: \*Increase in FY 00/01 is for six months  
 \*\*Includes health care benefits - 2,566 full-time workers (4.6 M/yr. Total, \$1 M/yr. County)

**ESTIMATED ADMINISTRATIVE COSTS FOR THE MANDATED  
PUBLIC AUTHORITY FUNCTIONS**

**Direct Costs**

*Salaries and Benefits*

| Class/Title                   | Function          | FTE      | Start-Up Costs (1st Yr.) | Annual Costs      |
|-------------------------------|-------------------|----------|--------------------------|-------------------|
| 5289/Social Svcs Amin III     | Manager           | 1        | \$ 77,928                | \$ 81,045         |
| 5287/Social Svcs Admin I      | Office Manager    | 1        | \$ 67,573                | \$ 70,276         |
| 5204/Aging Prog Specialist II | Registry Staff    | 3        | \$ 164,591               | \$ 171,175        |
| 2730/Sr Clerk                 | Background Checks | 1        | \$ 36,828                | \$ 38,301         |
| 5204/Aging Prog Specialist II | Training          | 1        | \$ 54,864                | \$ 57,058         |
| <b>Subtotals</b>              |                   | <b>7</b> | <b>\$ 401,784</b>        | <b>\$ 417,855</b> |

*Services and Supplies*

| Description/Methodology                    | Start-Up Costs (1st Yr.) | Annual Costs      |
|--|--------------------------|-------------------|
| Space                                      | \$ 35,640                | \$ 35,640         |
| Start-up Costs, e.g.furniture              | \$ 25,900                | \$ -              |
| Ongoing S&S                                | \$ 28,000                | \$ 28,000         |
| IT Costs                                   | \$ 47,871                | \$ 38,297         |
| Insurance                                  | \$ 20,000                | \$ 20,000         |
| Reimbursement for IP Training              | \$ 125,000               | \$ 125,000        |
| etc. e.g. advertising, conference expenses | \$ 15,000                | \$ 15,000         |
| <b>Subtotals</b>                           | <b>\$ 297,411</b>        | <b>\$ 261,937</b> |

*County Svcs./Consultant Svcs*

| Description          | Start-Up Costs    | Annual Costs      |
|----------------------|-------------------|-------------------|
| Labor Relations      | \$ 178,000        | \$ 100,000        |
| County & HHSa Liason | \$ 35,100         | \$ 36,504         |
| Legal Services       | \$ 59,305         | \$ 61,677         |
| Accounting Services  | \$ 10,000         | \$ 10,000         |
| Risk Management      | \$ 20,000         | \$ 20,000         |
| <b>Subtotals</b>     | <b>\$ 302,405</b> | <b>\$ 228,181</b> |

Inderect Costs (Clerical, admin)      \$2,200 per person      \$ 15,400      \$ 15,400

|                               |           |                  |           |                |
|-------------------------------|-----------|------------------|-----------|----------------|
| <b>GRAND TOTAL</b>            | <b>\$</b> | <b>1,017,000</b> | <b>\$</b> | <b>923,373</b> |
| County Share of Cost (16.16%) | \$        | 164,347          | \$        | 149,217        |
| Program Revenue (83.84%)      | \$        | 852,652.39       | \$        | 774,156        |



**ESTIMATED ADMINISTRATIVE COSTS FOR THE MANDATED  
AND OPTIONAL PUBLIC AUTHORITY FUNCTIONS**

**Direct Costs**

*Salaries and Benefits*

| Class/Title                   | Function               | FTE       | Start-Up Costs (1st Yr.) | Annual Costs        |
|-------------------------------|------------------------|-----------|--------------------------|---------------------|
| 5289/Social Svcs Amin III     | Manager                | 1         | \$ 77,928                | \$ 81,045           |
| 5287/Social Svcs Admin I      | Office Manager         | 1         | \$ 67,573                | \$ 70,026           |
| 5204/Aging Prog Specialist II | Registry Staff         | 3         | \$ 164,591               | \$ 171,175          |
| 2730/Sr Clerk                 | Background Checks      | 1         | \$ 36,828                | \$ 38,301           |
| 2510/Senior Account Clerk*    | Supervision of Payroll | 2         | \$ 79,830                | \$ 83,023           |
| 2472/Intermediate Acct Clerk* | Payroll                | 17        | \$ 558,953               | \$ 581,311          |
| 5204/Aging Prog Specialist II | Training               | 1         | \$ 54,864                | \$ 57,058           |
| 4913/Protective Svcs Assist*  | Oversight of Providers | 3         | \$ 104,481               | \$ 108,660          |
| <b>Subtotals</b>              |                        | <b>29</b> | <b>\$ 1,145,048</b>      | <b>\$ 1,190,599</b> |

*Services and Supplies*

| Description/Methodology                 | Start-Up Costs (1st Yr.) | Annual Costs        |
|---|--------------------------|---------------------|
| Space                                   | \$ 106,920               | \$ 106,920          |
| Start-up Costs, e.g.furniture           | \$ 107,300               | \$ 107,300          |
| Ongoing S&S                             | \$ 116,000               | \$ 116,000          |
| IT Costs                                | \$ 158,659               | \$ 158,659          |
| Stipend for IP's Serving Acute Clients* | \$ 1,440,000             | \$ 1,440,000        |
| Reimbursement for IP Training           | \$ 125,000               | \$ 125,000          |
| 24 Hr Emergency Services*               | \$ 2,340                 | \$ 2,340            |
| Cost for Background Checks*             | \$ 200,000               | \$ 200,000          |
| Insurance                               | \$ 20,000                | \$ 20,000           |
| <b>Subtotals</b>                        | <b>\$ 2,276,219</b>      | <b>\$ 2,276,219</b> |

*County Svcs./Consultant Svcs*

| Description          | Start-Up Costs (1st Yr) | Annual Costs      |
|----------------------|-------------------------|-------------------|
| Labor Relations      | \$ 178,000              | \$ 100,000        |
| County & HHSA Liason | \$ 32,029               | \$ 36,504         |
| Legal Services       | \$ 59,305               | \$ 61,677         |
| Accounting Services  | \$ 10,000               | \$ 10,000         |
| Risk Management      | \$ 20,000               | \$ 20,000         |
| <b>Subtotals</b>     | <b>\$ 299,334</b>       | <b>\$ 228,181</b> |

Indirect Costs (Clerical, admin)      \$2,200 per person      \$ 63,800      \$ 63,800

|                               |                     |                     |
|-------------------------------|---------------------|---------------------|
| <b>GRAND TOTAL</b>            | <b>\$ 3,784,401</b> | <b>\$ 3,758,799</b> |
| County Share of Cost (16.16%) | \$ 611,559          | \$ 607,422          |
| Program Revenue (83.84%)      | \$ 3,172,842        | \$ 3,151,377        |

**HEALTH AND HUMAN SERVICES AGENCY**  
**ESTIMATED ADMINISTRATIVE COSTS FOR PUBLIC AUTHORITY FUNCTIONS**

**Direct Costs**

| Salaries and Benefits    |                        | Function  | FTE               | 1st Yr Costs                            |                       | 2nd Yr Cost           |  |
|--------------------------|------------------------|-----------|-------------------|---|-----------------------|-----------------------|--|
| Title                    | for 12 Months          |           |                   | Est Costs FY2001/02<br>(less than 1 Yr) | (1st full Yr Funding) | (1st full Yr Funding) |  |
| Director                 | Oversight              | 1         | \$ 75,000         | \$ 75,000                               | \$ 78,000             | \$ 78,000             |  |
| Assistant Director       | Office Manager         | 1         | \$ 53,682         | \$ 53,682                               | \$ 55,829             | \$ 55,829             |  |
| Social Worker            | Registry & Training    | 4         | \$ 175,133        | \$ 175,133                              | \$ 182,138            | \$ 182,138            |  |
| Senior Clerical          | Background checks      | 1         | \$ 29,387         | \$ 29,387                               | \$ 30,563             | \$ 30,563             |  |
| Senior Accounting Clerk  | Supervision of payroll | 2         | \$ 60,440         | \$ 60,440                               | \$ 62,857             | \$ 62,857             |  |
| Accounting Clerks        | Payroll                | 17        | \$ 446,184        | \$ 446,184                              | \$ 464,031            | \$ 464,031            |  |
| Social Worker Assistants | Oversight of Providers | 3         | \$ 83,432         | \$ 83,432                               | \$ 86,769             | \$ 86,769             |  |
| <b>Total Salaries</b>    |                        | <b>29</b> | <b>\$ 923,258</b> | <b>\$ 923,258</b>                       | <b>\$ 960,187</b>     | <b>\$ 960,187</b>     |  |
| Benefits and Taxes @ 30% |                        |           | \$ 276,977        | \$ 193,000                              | \$ 288,056            | \$ 288,056            |  |

**Services and Supplies**

| Description/Metodology                 | 1st Yr Costs        |   | 2nd Yr Cost           |                       |
|--|---------------------|---|-----------------------|-----------------------|
|  | for 12 Months       | Est Costs FY2001/02<br>(less than 1 Yr) | (1st full Yr Funding) | (1st full Yr Funding) |
| Space                                  | \$ 106,920          | \$ 71,636                               | \$ 106,920            | \$ 106,920            |
| Start-up Costs, e.g.furniture          | \$ 107,300          | \$ 107,300                              | \$ -                  | \$ -                  |
| Ongoing S&S                            | \$ 116,000          | \$ 77,720                               | \$ 116,000            | \$ 116,000            |
| IT Costs                               | \$ 158,659          | \$ 106,302                              | \$ 158,659            | \$ 158,659            |
| Stipend for IP's Serving Acute Clients | \$ 1,440,000        | \$ 964,800                              | \$ 1,440,000          | \$ 1,440,000          |
| Reimbursement for IP Training          | \$ 125,000          | \$ 125,000                              | \$ 125,000            | \$ 125,000            |
| 24 Hr Emergency Services               | \$ 2,340            | \$ 2,340                                | \$ 2,340              | \$ 2,340              |
| Cost for Background Checks             | \$ 200,000          | \$ 200,000                              | \$ 200,000            | \$ 200,000            |
| Insurance                              | \$ 20,000           | \$ 20,000                               | \$ 20,000             | \$ 20,000             |
| <b>Subtotals</b>                       | <b>\$ 2,276,219</b> | <b>\$ 1,675,098</b>                     | <b>\$ 2,168,919</b>   | <b>\$ 2,168,919</b>   |

| County Svcs./Consultant Svcs | Description                       | 1st Yr Costs<br>for 12 Months | Est Costs FY2001/02<br>(less than 1 Yr) | 2nd Yr Cost<br>(1st full Yr Funding) |
|------------------------------|-----------------------------------|-------------------------------|---|--------------------------------------|
| Labor Relations              |                                   | \$ 178,000                    | \$ 178,000                              | \$ 100,000                           |
| County & HSA Liason          | 50% of Admin Anaylst III          | \$ 32,029                     | \$ 32,029                               | \$ 36,504                            |
| Legal Services               | 50% of Dep County Counsel III     | \$ 59,305                     | \$ 59,305                               | \$ 61,677                            |
| Accounting Services          |                                   | \$ 10,000                     | \$ 10,000                               | \$ 10,000                            |
| Risk Management              |                                   | \$ 20,000                     | \$ 20,000                               | \$ 20,000                            |
| Human Resources              | Consultant for start-up personnel | \$ 50,000                     | \$ 50,000                               | \$ 50,000                            |
| Payroll/Personnel Mgmt.      | Consultant for payroll/personnel  | \$ 20,000                     | \$ 20,000                               | \$ 20,000                            |
| General Services             |                                   | \$ 25,000                     | \$ 16,750                               | \$ 25,000                            |
| Purchasing                   |                                   | \$ 8,000                      | \$ 8,000                                | \$ 8,000                             |
| Treasurer                    |                                   | \$ 10,000                     | \$ 10,000                               | \$ 10,000                            |
| <b>Subtotals</b>             |                                   | <b>\$ 412,334</b>             | <b>\$ 404,084</b>                       | <b>\$ 341,181</b>                    |

**IHSS Advisory Comm Stipends** \$50/mtg X 15 mtngs x 11 members \$ 8,250 \$ 8,250 \$ 8,250

**Indirect Costs (Clerical, admin)** \$2,200 per person \$ 63,800 \$ 47,850 \$ 63,800

**GRAND TOTAL**  
 County Share of Cost (16.45%) **\$ 3,960,838** **\$ 2,971,614** **\$ 3,830,393**  
 Program Revenue (83.55%) \$ 658,451 \$ 495,723 \$ 636,993  
 \$ 3,302,386 \$ 2,475,890 \$ 3,193,401

# SAN JOAQUIN COUNTY

**FISCAL YEAR 2002-03  
PROJECTED COUNTY BUDGET**

Budget #

Yrly Hrs= 2,700,000

PUBLIC AUTHORITY

|             |             |  |  |
|-------------|-------------|--|--|
| TOTAL       | Admin.      |  |  |
| Cost Center |             |  |  |
| FY Ends     | <i>JUNE</i> |  |  |

ACCT.NO.    ACCOUNT TITLE

**EXPENDITURES**

**SALARIES AND BENEFITS**

**Benefits:                    39.57%**

|           |   |
|-----------|---|
| 0101-0000 | SALARIES-REGULAR [R]                        |
| 0101-0001 | ADMINISTRATIVE ADJUSTMENT                   |
| 0101-0002 | SALARIES-CAFETERIA [C] (CAT & PM)           |
| 0101-0003 | SALARIES-CAR ALLOWANCE                      |
| 0101-0005 | SALARIES-ONE TIME MOU ADJUSTMENT            |
| 0101-0007 | SALARIES-DIFFERENTIAL PAY-PARKING           |
| 0131-0000 | SALARIES-EXTRA HELP[T]                      |
| 0141-0000 | SALARIES-CONTRACTUAL                        |
| 0171-0000 | SALARIES-OVERTIME                           |
| 0189-0000 | UNEMPLOYMENT INSURANCE [R+C+T]              |
| 0191-0000 | RETIREMENT [R+C]                            |
| 0193-0000 | SOCIAL SECURITY [R+C]                       |
| 0193-0003 | SOCIAL SECURITY-MEDI [R+C]                  |
| 0193-0004 | SOCIAL SECURITY-TEMPS [T]                   |
| 0193-0005 | SOCIAL SECURITY-MEDI TEMPS [T]              |
| 0194-0000 | LIFE INSURANCE [FTE ALLOCATED]              |
| 0194-0001 | LIFE INSURANCE - ADMIN. ADJ. [C]            |
| 0195-0000 | HEALTH INSURANCE [FTE ALLOC.-C]             |
| 0195-0002 | HEALTH INSURANCE-PT [FTE ALLOC.]            |
| 0197-0000 | DENTAL INSURANCE [FTE ALLOC.-C]             |
| 0199-0000 | VISION INSURANCE [FTE ALLOC.-C]             |
| 0         | <b><u>TOTAL SALARIES &amp; BENEFITS</u></b> |

|         |         |   |   |
|---------|---------|---|---|
| 335,000 | 335,000 | 0 | 0 |
| 0       | 0       | 0 | 0 |
| 0       | 0       | 0 | 0 |
| 0       | 0       | 0 | 0 |
| 0       | 0       | 0 | 0 |
| 2,860   | 2,860   | 0 | 0 |
| 0       | 0       | 0 | 0 |
| 10,000  | 10,000  | 0 | 0 |
| 15,000  | 15,000  | 0 | 0 |
| 1,005   | 1,005   | 0 | 0 |
| 32,663  | 32,663  | 0 | 0 |
| 20,770  | 20,770  | 0 | 0 |
| 4,858   | 4,858   | 0 | 0 |
| 0       | 0       | 0 | 0 |
| 0       | 0       | 0 | 0 |
| 420     | 420     | 0 | 0 |
| 0       | 0       | 0 | 0 |
| 41,600  | 41,600  | 0 | 0 |
| 0       | 0       | 0 | 0 |
| 2,840   | 2,840   | 0 | 0 |
| 536     | 536     | 0 | 0 |
| 467,552 | 467,552 | 0 | 0 |

**SERVICES AND SUPPLIES**

|           |   |                |                |   |   |
|-----------|---|----------------|----------------|---|---|
| 0201-0000 | OFFICE SUPPLIES                             | 5,000          | 5,000          | 0 | 0 |
| 0202-0000 | POSTAGE                                     | 3,000          | 3,000          | 0 | 0 |
| 0203-0000 | SUBSCRIPTIONS & PERIODICALS                 | 1,000          | 1,000          | 0 | 0 |
| 0206-0000 | COMMUNICATIONS                              | 10,000         | 10,000         | 0 | 0 |
| 0206-0001 | COMMUNICATIONS-NON ISF TELEPHONE            | 1,000          | 1,000          | 0 | 0 |
| 0206-0006 | COMMUNICATIONS-ON-LINE                      | 1,000          | 1,000          | 0 | 0 |
| 0209-0000 | MEMBERSHIPS                                 | 500            | 500            | 0 | 0 |
| 0211-0000 | MAINTENANCE-EQUIPMENT                       | 0              | 0              | 0 | 0 |
| 0214-0000 | RENTS & LEASES-EQUIPMENT                    | 0              | 0              | 0 | 0 |
| 0214-0001 | RENTS & LEASES-COPY MACNHINES               | 5,000          | 5,000          | 0 | 0 |
| 0214-0010 | RENTS & LEASES-RADIO ISF                    | 0              | 0              | 0 | 0 |
| 0214-0386 | RENTS-OFFICE AUTO EQUIPMENT                 | 0              | 0              | 0 | 0 |
| 0217-0000 | TRAVEL                                      | 5,000          | 5,000          | 0 | 0 |
| 0218-0000 | TRAVEL-MOTOR POOL                           | 3,000          | 3,000          | 0 | 0 |
| 0220-0000 | PROFESSIONAL SERVICES                       | 10,000         | 10,000         | 0 | 0 |
|           | TRAINING WAGES                              | 144,000        | 144,000        | 0 | 0 |
| 0220-0007 | D.P. DIRECT CHARGES                         | 2,000          | 2,000          | 0 | 0 |
| 0220-0200 | ASDC (see 0220-9999)                        | 0              | 0              | 0 | 0 |
| 0220-0201 | ALLOCATED DEPARTMENT OVERHEAD               | 0              | 0              | 0 | 0 |
| 0220-0233 | TRAINING SUPPLIES                           | 0              | 0              | 0 | 0 |
| 0220-0244 | SUPPORTIVE SERVICES                         | 0              | 0              | 0 | 0 |
| 0220-9999 | ALLOC. SERVICE DEPT COSTS                   | 30,000         | 30,000         | 0 | 0 |
| 0223-0000 | PUBLICATIONS & LEGAL NOTICES                | 1,000          | 1,000          |   |   |
| 0226-0000 | SPECIAL DEPARTMENTAL EXPENSES               | 10,000         | 10,000         |   |   |
| 0232-0000 | INSURANCE-WC                                | 10,000         | 10,000         |   |   |
| 0236-0000 | INSURANCE-CASUALTY                          | 5,000          | 5,000          |   |   |
| 0246-0000 | HOUSEHOLD SUPPLIES                          | 0              | 0              |   |   |
| 0249-0000 | UTILITIES                                   | 24,000         | 24,000         |   |   |
| 0264-0000 | RENT (new location)                         | 60,000         | 60,000         |   |   |
| 0269-0000 | SMALL TOOLS & INSTRUMENTS                   | 3,000          | 3,000          |   |   |
| 0269-1000 | MINOR FURNITURE                             | 20,000         | 20,000         |   |   |
|           | <b><u>TOTAL SERVICES &amp; SUPPLIES</u></b> | <b>353,500</b> | <b>353,500</b> |   |   |

|                            |                           |               |               |          |          |
|----------------------------|---------------------------|---------------|---------------|----------|----------|
| <b><u>FIXED ASSETS</u></b> |                           |               |               |          |          |
| 0451-0000                  | EQUIPMENT                 | 60,000        | 60,000        | 0        | 0        |
|                            | <b>TOTAL FIXED ASSETS</b> | <b>60,000</b> | <b>60,000</b> | <b>0</b> | <b>0</b> |

|                                    |                                   |          |          |          |          |
|------------------------------------|-----------------------------------|----------|----------|----------|----------|
| <b><u>INTRA FUND TRANSFERS</u></b> |                                   |          |          |          |          |
| 0501-0010                          | INTRA FUND TRANSFERS              | 0        | 0        | 0        | 0        |
|                                    | <b>TOTAL INTRA FUND TRANSFERS</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> |

|                           |                |                |          |          |
|---------------------------|----------------|----------------|----------|----------|
| <b>TOTAL EXPENDITURES</b> | <b>881,052</b> | <b>881,052</b> | <b>0</b> | <b>0</b> |
|---------------------------|----------------|----------------|----------|----------|

|                   |       |       |   |   |
|-------------------|-------|-------|---|---|
| F-T-E (ALLOCATED) | 10,00 | 10,00 | 0 | 0 |
| F-T-E (TEMPORARY) | 0     | 0     | 0 | 0 |

|                       |                      |                |                |          |          |
|-----------------------|----------------------|----------------|----------------|----------|----------|
| <b><u>REVENUE</u></b> |                      |                |                |          |          |
|                       | IHSS FEDERAL SHARE   | 361,231        | 361,231        | 0        | 0        |
|                       | IHSS STATE SHARE     | 361,231        | 361,231        | 0        | 0        |
|                       | <b>TOTAL REVENUE</b> | <b>722,462</b> | <b>722,462</b> | <b>0</b> | <b>0</b> |

|                         |                |                |          |          |
|-------------------------|----------------|----------------|----------|----------|
| <b>NET COUNTY COSTS</b> | <b>158,589</b> | <b>158,589</b> | <b>0</b> | <b>0</b> |
|-------------------------|----------------|----------------|----------|----------|

|                               |                                     |                |                |          |          |
|-------------------------------|-------------------------------------|----------------|----------------|----------|----------|
| <b><u>POSITION DETAIL</u></b> |                                     |                |                |          |          |
|                               | EXECUTIVE DIRECTOR                  | 75,000         | 75,000         | 0        | 0        |
|                               | ADMINISTRATIVE ASSISTANT            | 50,000         | 50,000         | 0        | 0        |
|                               | PA WORKER SUPERVISOR                | 35,000         | 35,000         | 0        | 0        |
|                               | PA WORKER                           | 25,000         | 25,000         | 0        | 0        |
|                               | PA WORKER                           | 25,000         | 25,000         | 0        | 0        |
|                               | PA WORKER                           | 25,000         | 25,000         | 0        | 0        |
|                               | PA WORKER                           | 25,000         | 25,000         | 0        | 0        |
|                               | PA WPRKER                           | 25,000         | 25,000         | 0        | 0        |
|                               | PA WORKER                           | 25,000         | 25,000         | 0        | 0        |
|                               | PA WORKER                           | 25,000         | 25,000         | 0        | 0        |
|                               | <b><u>POSITION DETAIL TOTAL</u></b> | <b>335,000</b> | <b>335,000</b> | <b>0</b> | <b>0</b> |

## IHSS - IP (Individual Provider Mode) with Public Authority - 2 scenarios

Data is utilizing current operations as of the Midyear FY 01/02 budget (see below).

|   | Scenario #1              | Scenario #2              |
|---|--------------------------|--------------------------|
| <b>CURRENT IHSS ESTIMATED COSTS:</b>  |                          |                          |
| IHSS ADMIN  | 3,009,809                | 3,009,809                |
| IHSS IP (100%)  | 25,747,487               | 25,747,487               |
| <b>TOTAL</b>  | <b>28,757,296</b>        | <b>28,757,296</b>        |
|   | <b>IP WAGES @ \$7.50</b> | <b>IP WAGES @ \$8.00</b> |
| <b>IHSS with PUBLIC AUTHORITY EST:</b>  |                          |                          |
| IHSS ADMIN (existing level)   | 3,009,809                | 3,009,809                |
| PUBLIC AUTHORITY (est .2013<br>(avg of 8 counties) X 3,513,993<br>(Stanislaus County FY 01/02<br>Midyear est of total paid hrs) * | 707,191                  | 707,191                  |
| IHSS IP * (Compute hourly rate<br>scenarios based on FY 01/02<br>Midyear caseload projections)                                    | 28,739,701               | 30,624,925               |
| <b>TOTAL</b>  | <b>32,456,701</b>        | <b>34,341,925</b>        |
| <b>DIFF</b>   | <b>3,699,405</b>         | <b>5,584,629</b>         |

### COUNTY COST INFORMATION:

|  |                  |                  |
|--|------------------|------------------|
| <b>Current IHSS Estimated County Costs:</b>        |                  |                  |
| ADMIN (est 15% composite co share)                 | 451,471          | 451,471          |
| IP (est 20.14% composite co share)                 | 5,185,813        | 5,185,813        |
| <b>Total Estimated County Share</b>                | <b>5,637,284</b> | <b>5,637,284</b> |
| <b>IHSS with Public Authority Est County Cost:</b> |                  |                  |
| ADMIN (est 15% composite co share) inc PA          | 557,550          | 557,550          |
| IP (est 20.14% composite co share)                 | 5,788,176        | 6,167,860        |
| <b>Total Estimated County Share</b>                | <b>6,345,726</b> | <b>6,725,410</b> |
| <b>DIFF</b>  | <b>708,441</b>   | <b>1,088,125</b> |

Note: The IP mode with Public Authority does address resolving the requirement of AB1682 to establish an employer of record for the purposes of employee/employer relations including collective bargaining with IHSS Providers.

\*This worksheet is for comparison purposes only to current IHSS projected operations as of the FY 01/02 Midyear budget.

\*These estimates do not include anticipated caseload growth in FY 02/03 and already known post-midyear increased adjustments. Further budget analysis will be required upon identification of the actual program design prior to recommendation by the Committee and approval by the Board of Supervisors.

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IHSS ADVISORY COMMITTEE BUDGET FOR FY 01/02  
 Updated 03/20/2002

|   |           |
|---|-----------|
| ALLOCATION/BUDGET:  | 52,982.00 |
| ESTIMATED EXPENSES:   |           |
| IHSS ADVISORY COMMITTEE MEMBER STIPENDS (Est through FY 01/02 - 15 mtg X \$20 X 10 members=\$3,000. Based on meeting twice ea month beginning 12/14/01 and assumes Jeff waives stipend/all other members receive payment)<br>(Per Board Action Number 2001-841 approved \$7,040). | 7,040.00  |
| CONTRACTED TEMPORARY STAFF (non-CSA employee) in direct support of the IHSS Advisory Committee. Estimate based on 16 wks X 32 hr X \$18.15 an hour.   | 9,300.00  |
| IHSS ADVISORY COMMITTEE TRAVEL (includes travel, training, mileage, conference fees)  |           |
| CONTRACTS (specified below):  |           |
|   |           |
| BALANCE REMAINING   | 36,642.00 |

WHY:

This committee has been established as required by AB 1682 and SB 288 to provide a recommendation of an employer of record for the purpose of collective bargaining for wages and benefits for the IHSS-IP program.

Establish a budget for this committee in order to meet the above goal.

WHAT:

Per CFL 00/01-48 effective 9/00. Pin code 023 was established to capture costs associated with the IHSS Advisory Committees.

"These costs may include but are not limited to: stipends, travel, training, mileage, conference fees, and supplies". Please note: supplies paid for by the Community Services Agency (CSA) will be charged as an overhead expense and will not be charged as a direct cost against this allocation. This is applying a consistent treatment of the purchases of our regular CSA office supplies in compliance with our state approved cost plan.

"Cost incurred by the County Welfare Department (CWD) for supporting the IHSS Advisory committee are not allowable for reimbursement under these codes. Any CWD costs for providing support activities for the IHSS Advisory Committee should be charged to the appropriate IHSS/PCSP claim codes on the County Expense Claim."



HOW:

**Stipend:**

The stipend payment will be \$20.00 per meeting, for each Advisory Committee member. The \$20.00 stipend is a reasonable cost to eliminate transportation barriers that Advisory Committee members may encounter.

Payment will require submission of a completed and signed invoice form (developed by CSA Accounting) from each committee member along with a copy of each meeting attendance sheet. The forms and sheets will require the IHSS manager signature for approval of payment. Please submit all forms to CSA Accounting - Contract/Accounts Payable Unit. (A completed W-9 must also be on-file in order to receive reimbursement). Checks will be mailed to each eligible member within 30 days of receipt of the invoice by CSA Accounting. (Contact: Pam Thompson, CSA Accounting-Contract/Accounts Payable Unit at 558-3986). We recommend that either the chair or the temporary support person collect all the necessary forms from the committee members and submit them as one package to CSA Accounting Accounts Payable unit.

Committee members may request to waive their stipend. If so, they should mark an "X" in the appropriate box on the invoice form which declares the intent to waive the stipend payment and sign and return the form to CSA Accounting. If waiving all future stipend payments no additional invoice forms will be necessary to be completed by the member (only the attendance sheet). A member can request to reinstate payment at any time following the forementioned process.

**Temporary Clerical Support Staff:**

A temporary staff person (non-CSA employee) hired to provide sole support for the Advisory Committee. Please note: This position can not provide IHSS clerical support services for CSA. In order to direct charge this cost to the IHSS Advisory Committee allocation this staff person must provide 100% clerical support for this committee. Payment will be made upon receipt of invoice from the vendor. This process will be initiated by the IHSS Manager if/when directed by the committee.

**IHSS Advisory Committee travel reimbursement:**

All committee member travel reimbursements will follow County maximum reimbursement limits in accordance with the County's Travel Policy. (Questions related to allowability of reimbursement, contact: Doreen Ott- CSA Accounting - Cost Accounting/Operations Unit 558-2895).

Out-of-county travel must be pre-approved prior to incurring costs. A CSA Travel Request form (PERS 23) is required to be completed and approved for all out-of-county travel. Arrangements and payment for registration and lodging may be made by County staff, thus reducing any "out of pocket" expenses for committee members.

Mileage reimbursement for in-county travel related to performing Advisory Committee activities will require completion of a CSA Supplemental Mileage form and County Blue Claim expense form.

Reimbursement for "out of pocket travel expenses" incurred by committee members will require the submission of receipts and a completion of a County Blue Claim expense form (signatures required).

The IHSS Manager will review and approve all committee travel reimbursements. (Please forward all necessary documents to: CSA Accounting - Contracts/Accounts Payable unit. Attn: Pam Thompson (558-3986). Again, the paper work can be collected by the chair person or the temporary staff and submitted to CSA Accounting

**Contracted services:**

A Request for Contract form (STAN AS987) completed by the IHSS manager will initiate the process to contract with an individual/organization to provide a service which will benefit the committee's intended goals. (Contact: Kim Dysert- CSA Accounting - Contract/Accts Payable Unit 558-2217).

Prepared by: Doreen Ott

03/20/2002

G:\Excel\_files\Cynthia\I.H.S.S\Advisory Committee\{accting info.xls}BUDGET