



Leveraging Technology to Build Meaningful Connections with Caregivers with an Award Winning Program

July 2026

Presenters:

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Agenda

- Development Insights & Data
- Strategic Impact & Alignment
- Accessibility & Inclusivity Enhancement
- Demonstration
- Expansion & New Partnership
- Q&A

Who We Are

Our Mission

Who we Serve

Core Functions



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Who We Are

Direct Services & Partnerships



Nutrition



Caregiving



Health



Supportive Services



Workforce Development



Advocacy



Isolation & Inclusion



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Who We Are

Direct Services & Partnerships



18

Partnerships with Diverse Network of Grantees



\$9.2M

Investment made from July 01, 2024 – June 30, 2025

Development Insights & Data

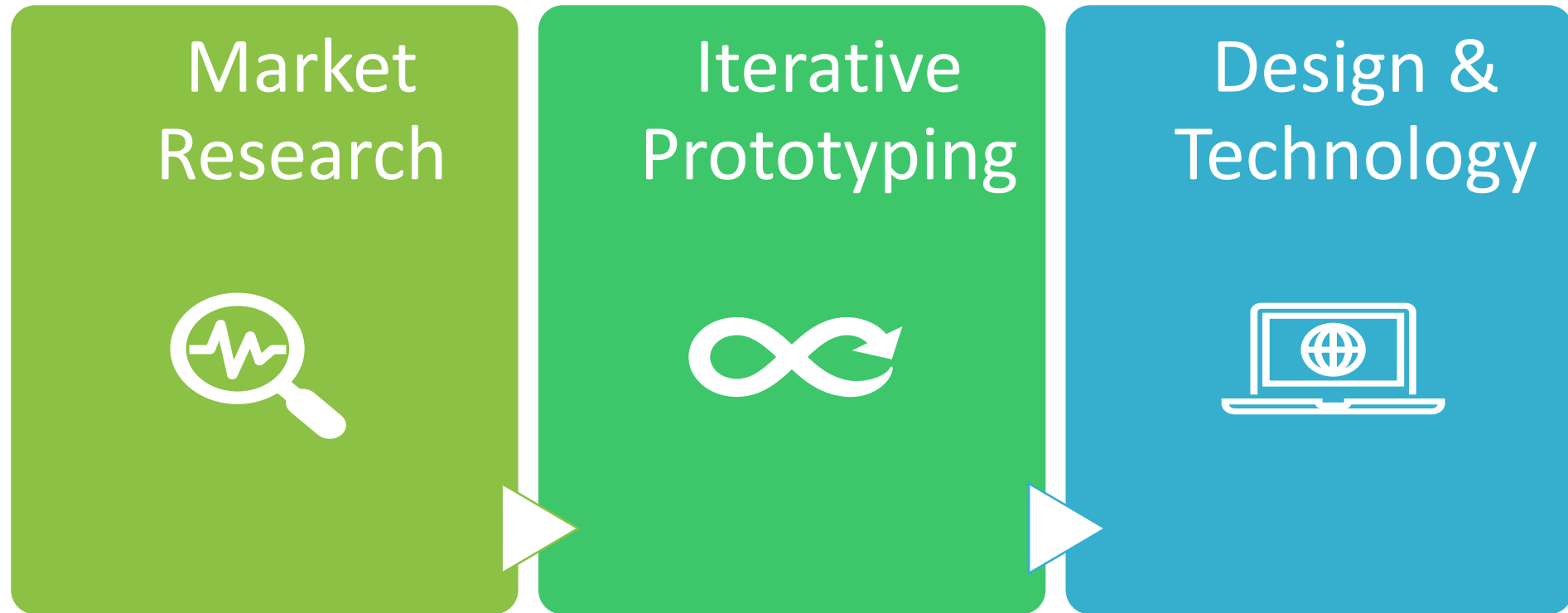
Project Formula & Partnership with Stanford

Goals:

1. Scale quality cost effective solutions
2. Develop learning network
3. Strengthen program capacity for innovation to improve reach to target population

Development Insights & Data

The concept



Development Insights & Data

Local Needs Assessment

87%

Of caregivers reported providing regular care to an adult family member or friend

56%

Of caregivers have provided care **for 4 years or more**

42%

Reported providing more than 40 hours of care per week

Source: 2020-2024 Sourcewise, Area Plan on Aging



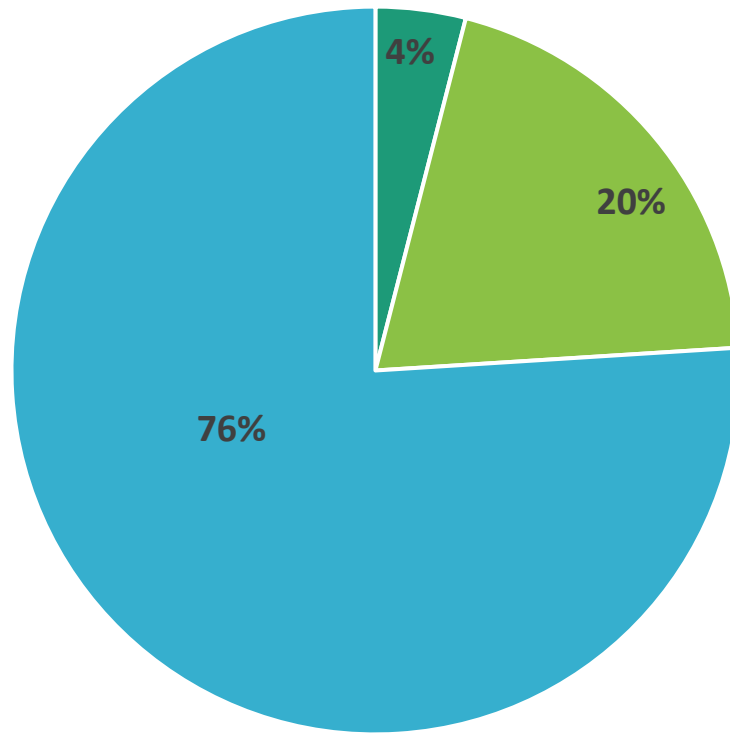
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Development Insights & Data

Local Needs Assessment, COVID19 Era

Santa Clara County Caregiver Breakdown
2020



■ Paid Caregivers ■ Unpaid Caregivers ■ Not Caregivers

Top 3 supportive services in need:

1. Finding time for self
2. A short-term break from caregiving
3. Easy activities to do with their loved one

Increasing challenges with how we...

- Connect
- & Measure Data

Source: 2020 COVID-10 Needs Assessment, Sourcewise

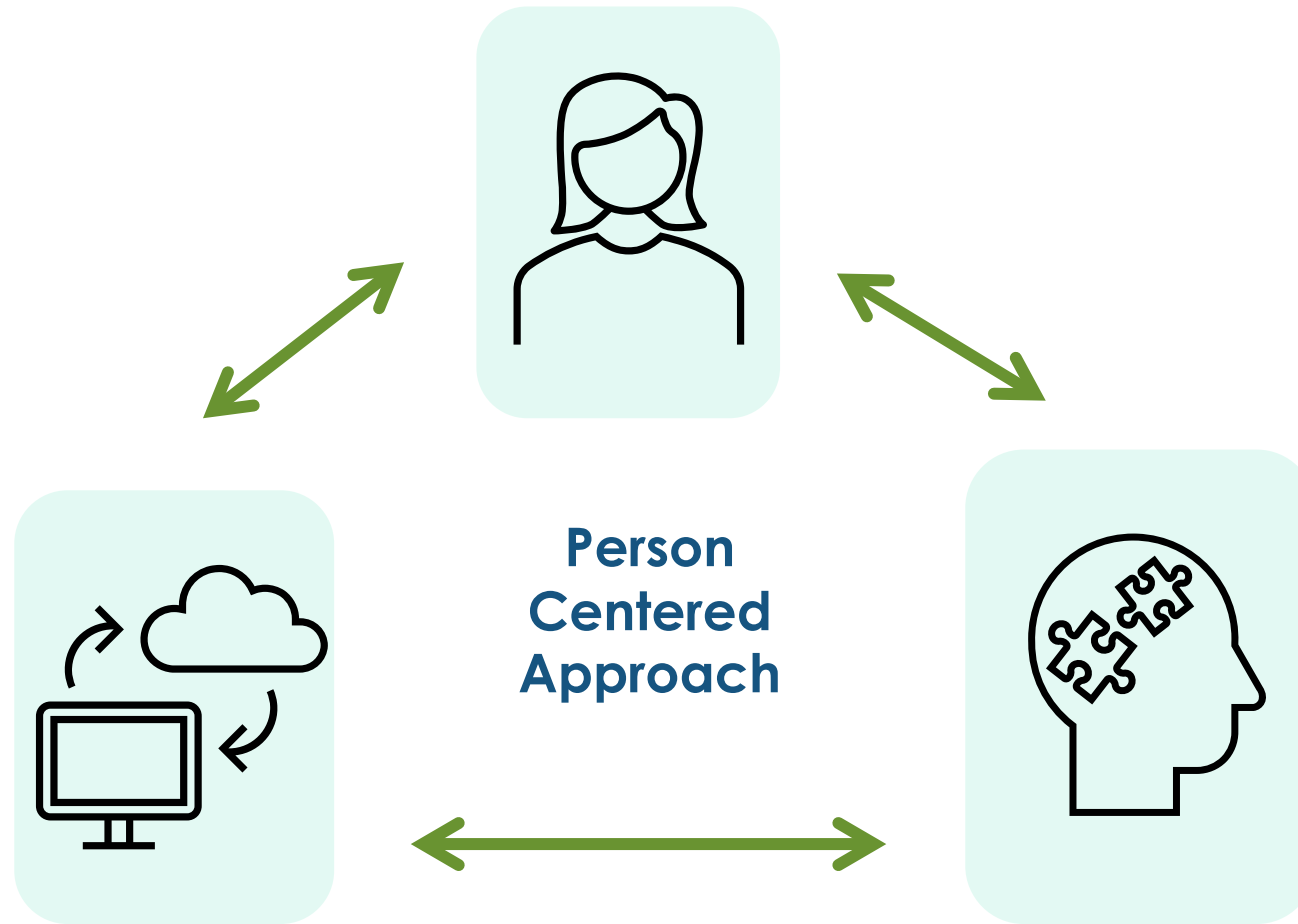
Development Insights & Data

Addressing Needs

Caregiver support in progressive stages of older adult need

Self-Service	Independent	Vulnerable	Dependent
			
Various Stages of Functionality Predominately informational needs (Guides, Insights, Referrals)	Highly Functional Requires Minimal Support Access to platform and light case management	Intermittent Support At risk of loosing Independence Needs ongoing support	High Risk Unable to remain independent Need for extensive case management

MyPlan: Design & Technology



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Strategic Impact & Alignment

Since implementation of MyPlan in 2021, we have experienced these programmatic benefits...

Real Time Visibility & Insights

Workflow Automations

Improved Reporting

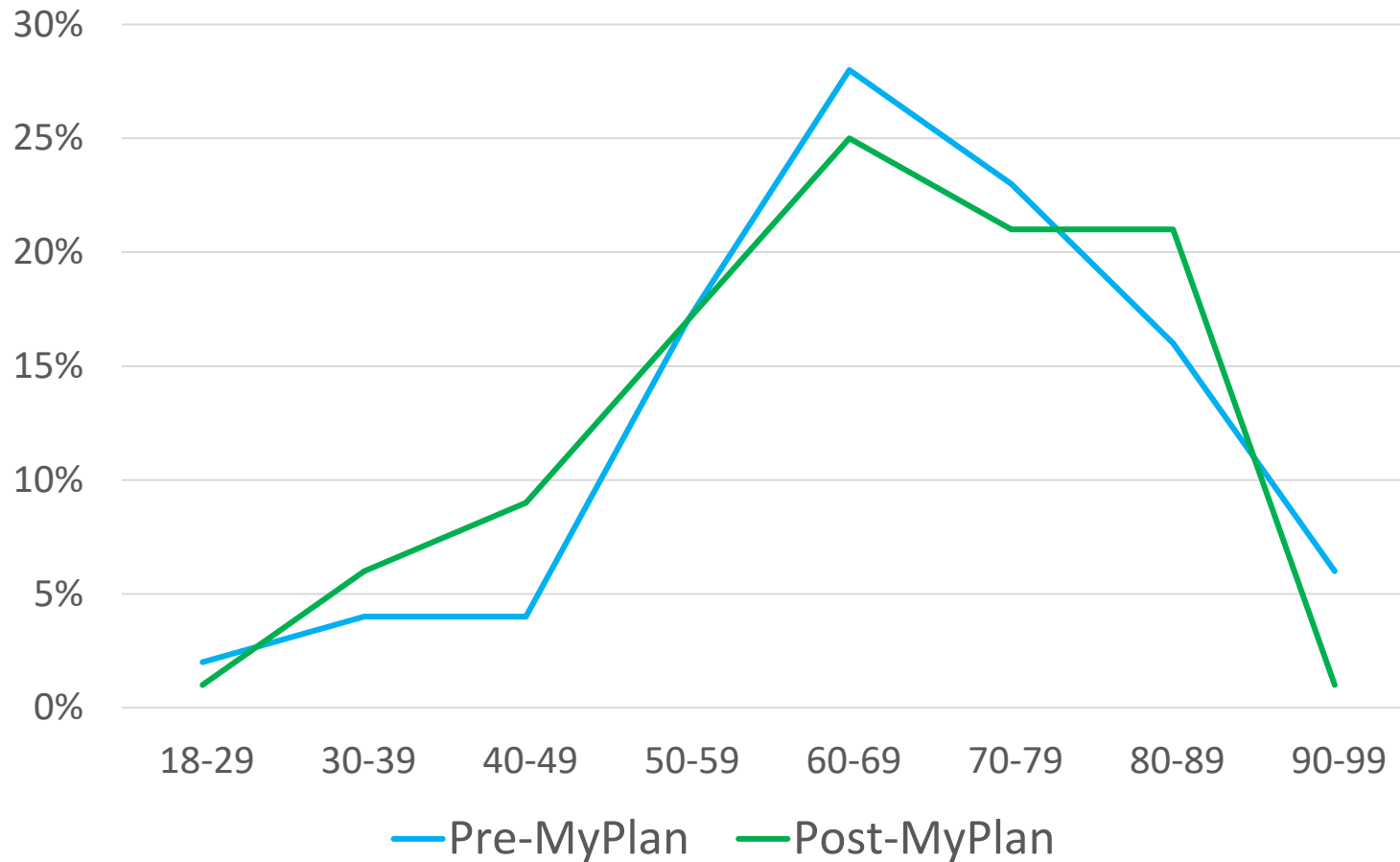
Enhanced Collaboration

Data Driven Decision Making

Improved Accountability

Strategic Impact & Alignment

Age of Caregivers



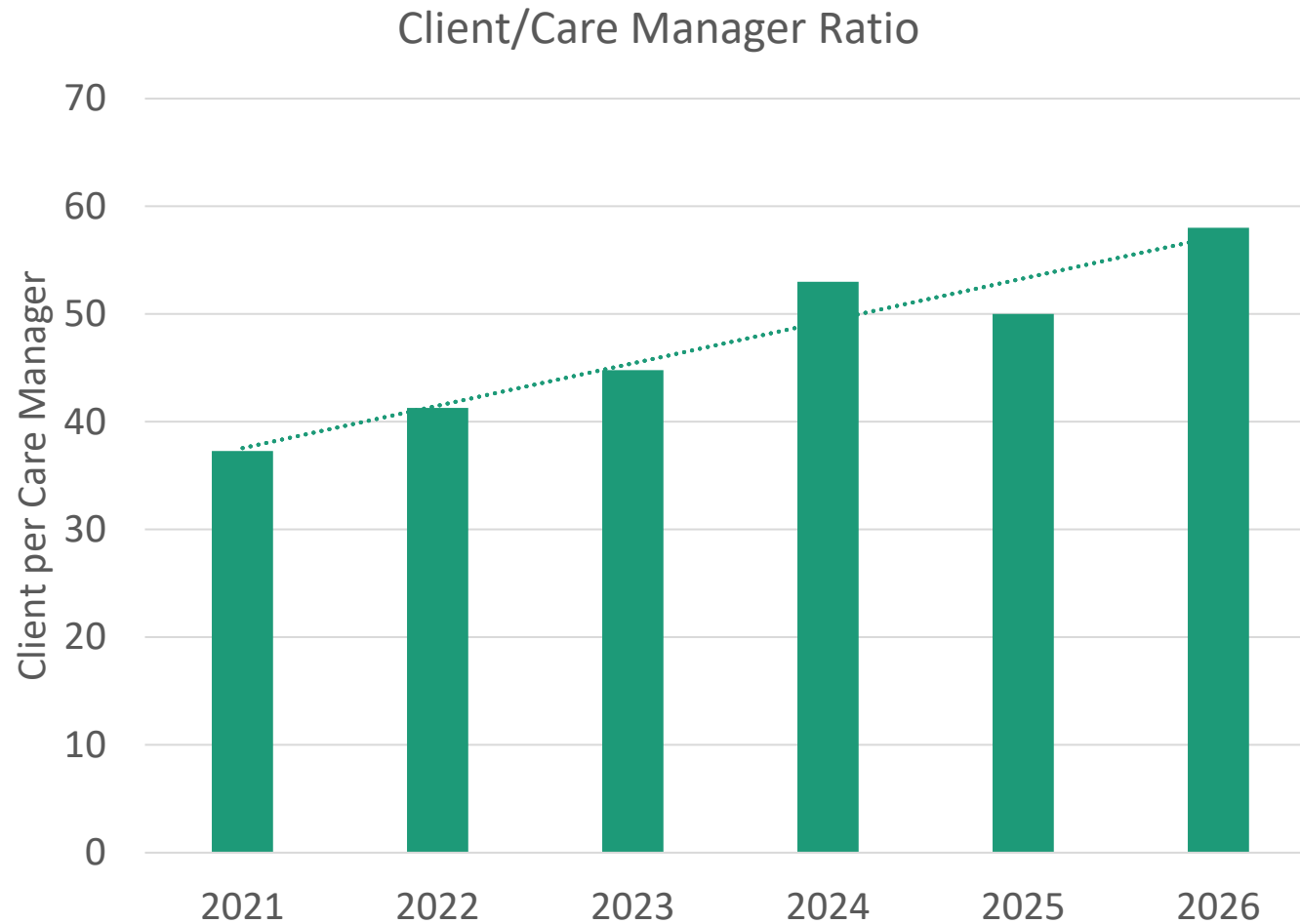
+ 7%

**Caregivers between Ages of
30 - 49**

Reaching younger caregivers

- Expanding how caregivers connect to access services
- Adapting how to communicate with caregivers

Strategic Impact & Alignment



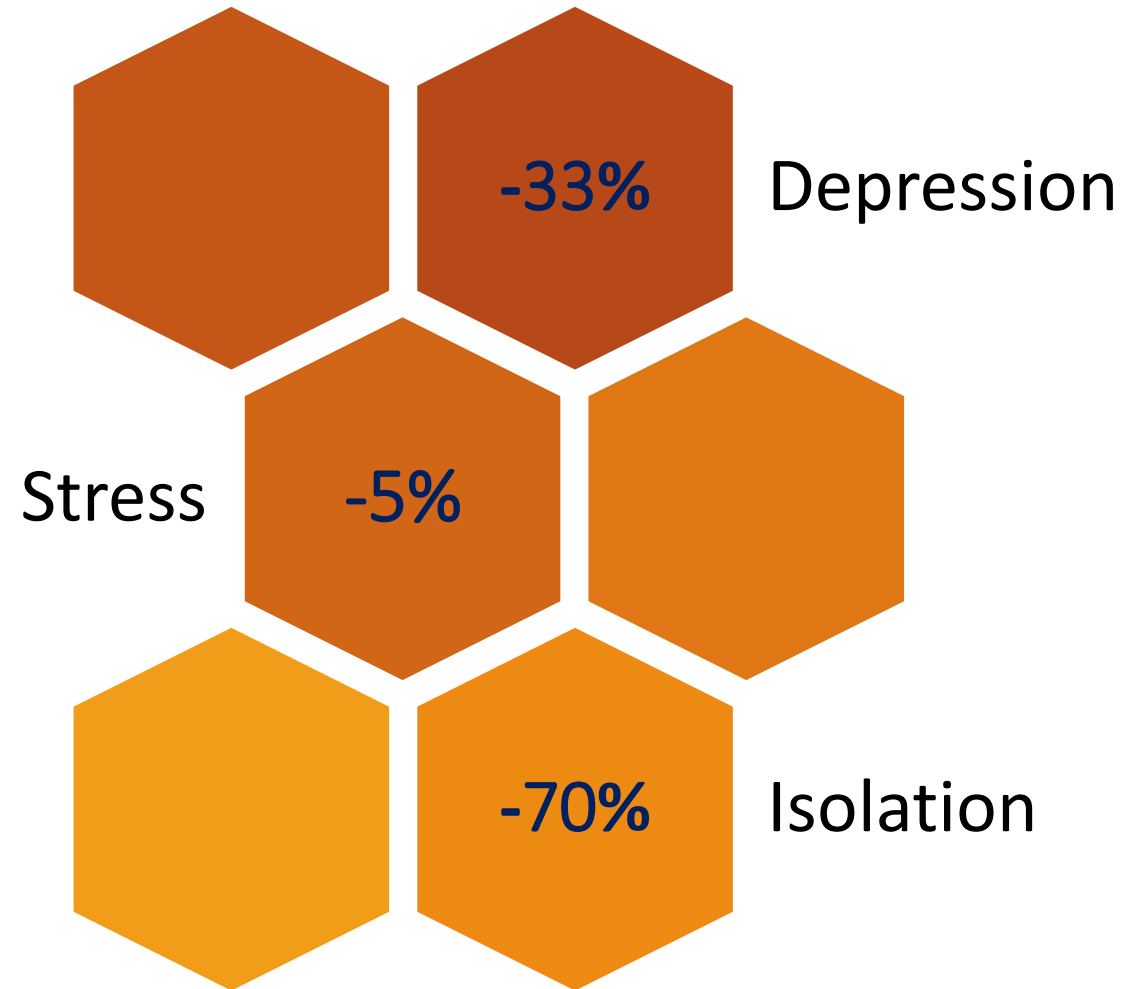
+ 43%

**Clients / Care Manager
Ratio**

MyPlan Measurements & Outcomes:

Caregivers

Caregiver Outcomes after 6 months



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MyPlan Measurements & Outcomes: Caregivers

Response to Unmet Needs of Caregivers

89% of caregivers need for respite was met

89% of caregivers Medicare & Medi-cal question needs were met

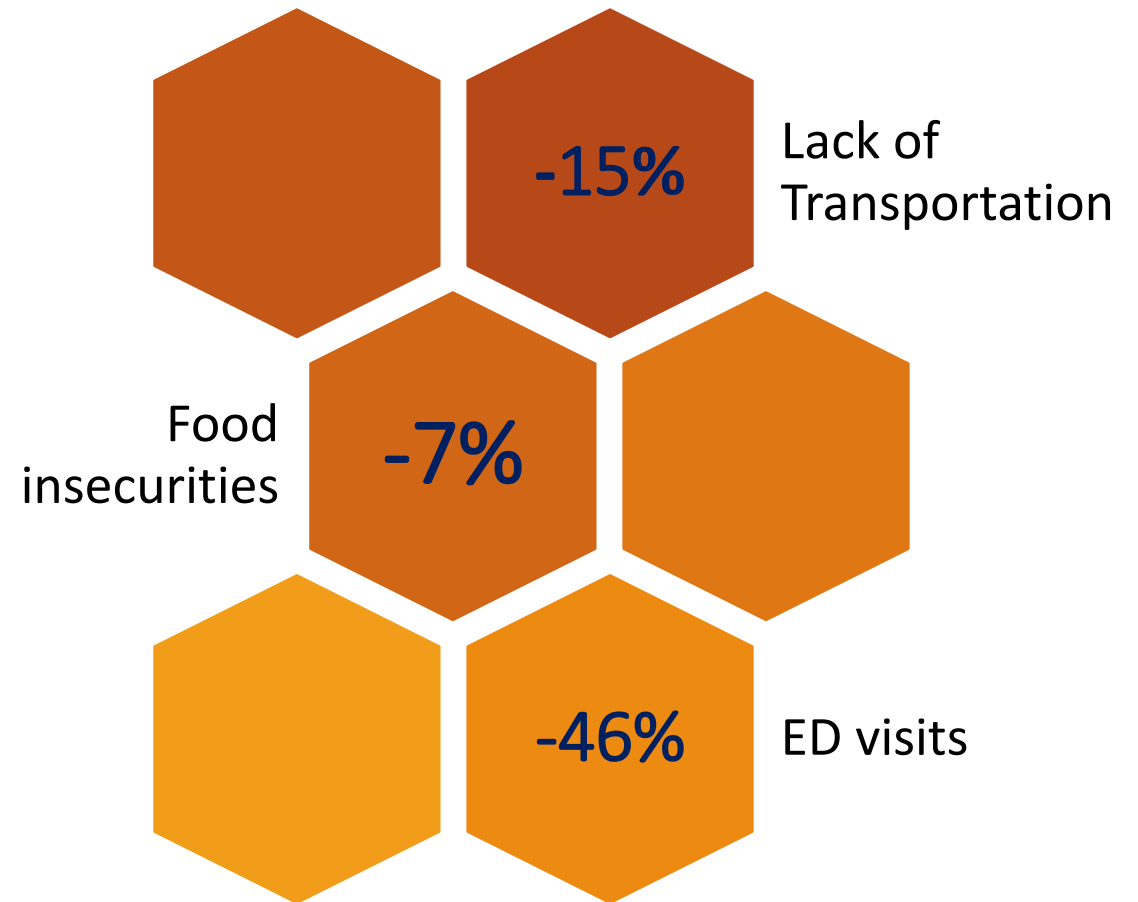
MyPlan: Measurements & Outcomes

Care Recipients



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Care Recipient Outcomes Improve Access and Reduce barriers



Meet: Marvin Gutierrez & Daniel Gutierrez

Addressing Needs



Age: 54

Prior teacher
and now
caregiver



Age: 78

Dementia

Veteran,
Korean War

Note fictitious names to preserve confidentiality, real statistics and impact from program.

Meet: Marvin Gutierrez & Daniel Gutierrez

Impact of Support



- ✓ Received Respite Subsidies and break from caregiving responsibilities
- ✓ Reduced self-reported stress by 25%
- ✓ Reduced self reported depression by 60%
- ✓ Reduced self-reported Fatigue by 67%



- ✓ Connected to services at Veterans Affairs
- ✓ Received In-home assistance
- ✓ Assistance with VA Aid & Attendance Application Submission

Impact on Community



“Your program has made a huge difference in my stress levels and your educational portal has taught me so much”

- Martha

Impact on Community

"I received immediate reference to a provider of in-home caregiving and they called so quickly. That even just talking to people who knew what we were experiencing was a great relief. Thank you so much."

- Jessica



Impact on Community



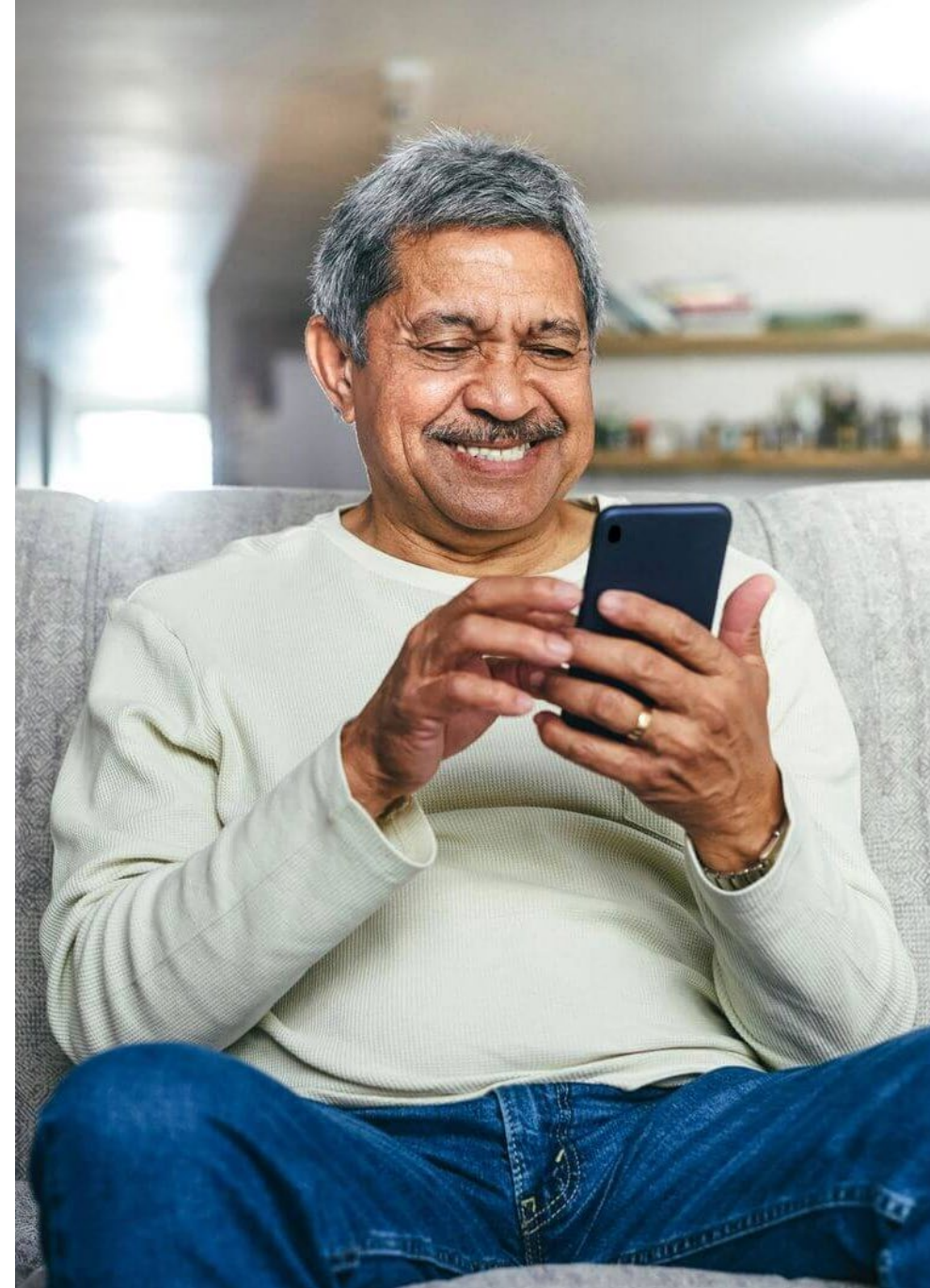
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Accessibility & Inclusivity Enhancements

- Fully Available in English and Spanish
- Closed captions on videos
- Articles can be printed, emailed, or shared
- Communication via SMS Text available for individuals with social anxiety or hearing impairment



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MyPlan Demonstration



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Caregiver Enrolls

10:53 sourcewise.gomohealth.care
in your phone as Sourcewise Chat.

Please take a few minutes to answer the following questions about you or the primary caregiver signing up today. We want you to know that all information shared and received in our program is confidential. Your information will not be shared or used for any other purpose.

Caregiver's Name *

John Q.

First

Caregiver

Last

Cell Phone Number *

(408) 123-4567

10:54 sourcewise.gomohealth.care

I have completed the enrollment form, provided electronic consent to enroll, and

☒ I grant permission to GoMo Health to contact my cell phone via text message from the phone number 43386.

CONFIRM

You may opt out at any time by... ALL.
For assistance with the pr... P.
Message and data rates m... ng
on your mobile

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Staff Receives Enrollment

New Sourcewise Sign-Up Form Received - Message (HTML)

File Message Help Acrobat Tell me what you want to do

Delete Delete Archive Reply Reply All Forward Respond Share to Teams All Apps HR To Manager Team Email Move Mark Unread Assign Policy Categorize Follow Up Tags Editing

New Sourcewise Sign-Up Form Received

GoMo Health
To Caregivers Network; [redacted]
Encrypted [redacted]

Hi,

[redacted] John Q Caregiver has completed the MyPlan Intake Form. Please see the escalations and/or Intake responses from John Q below:

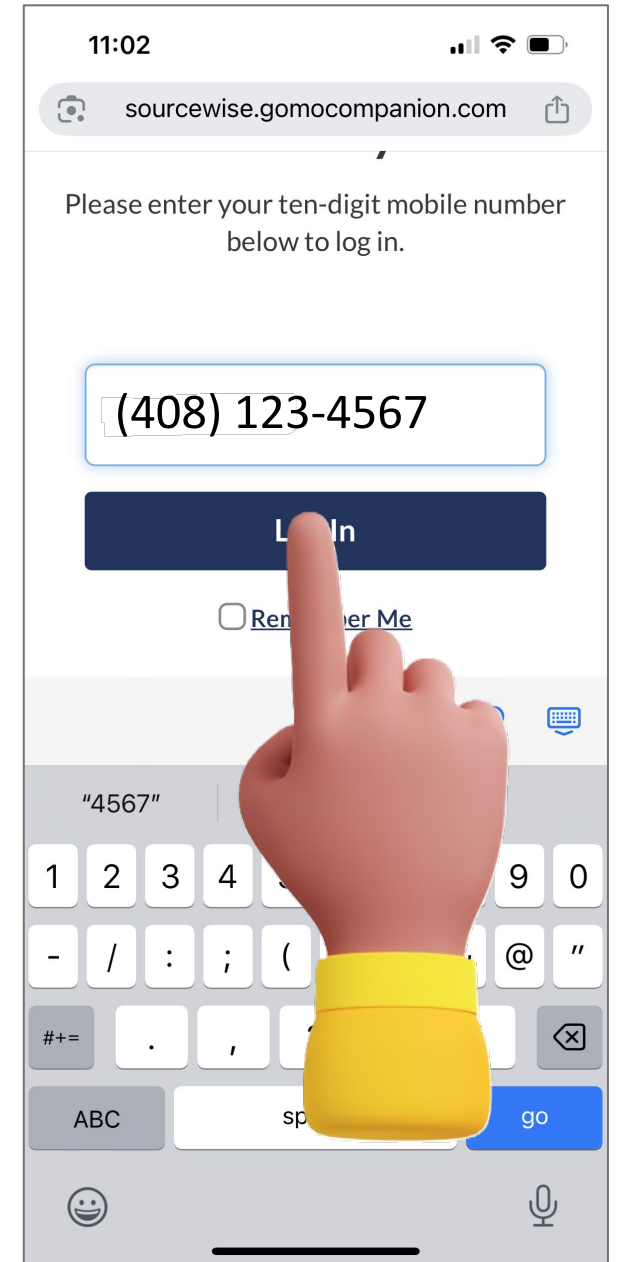
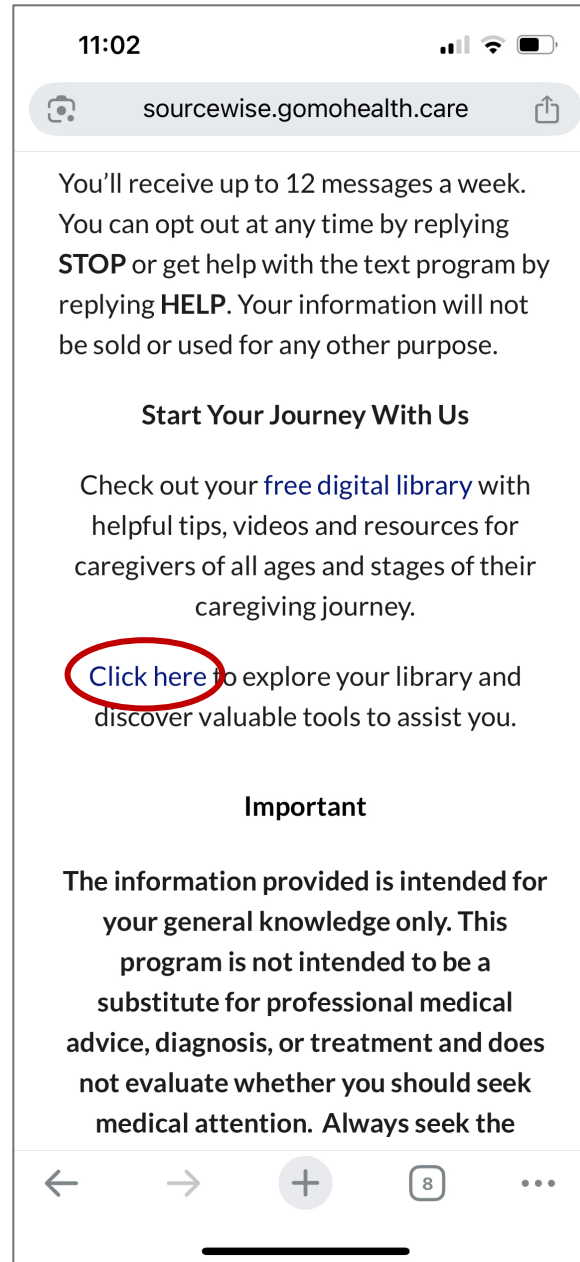
Escalations:

- Food insecurity
- High levels of stress

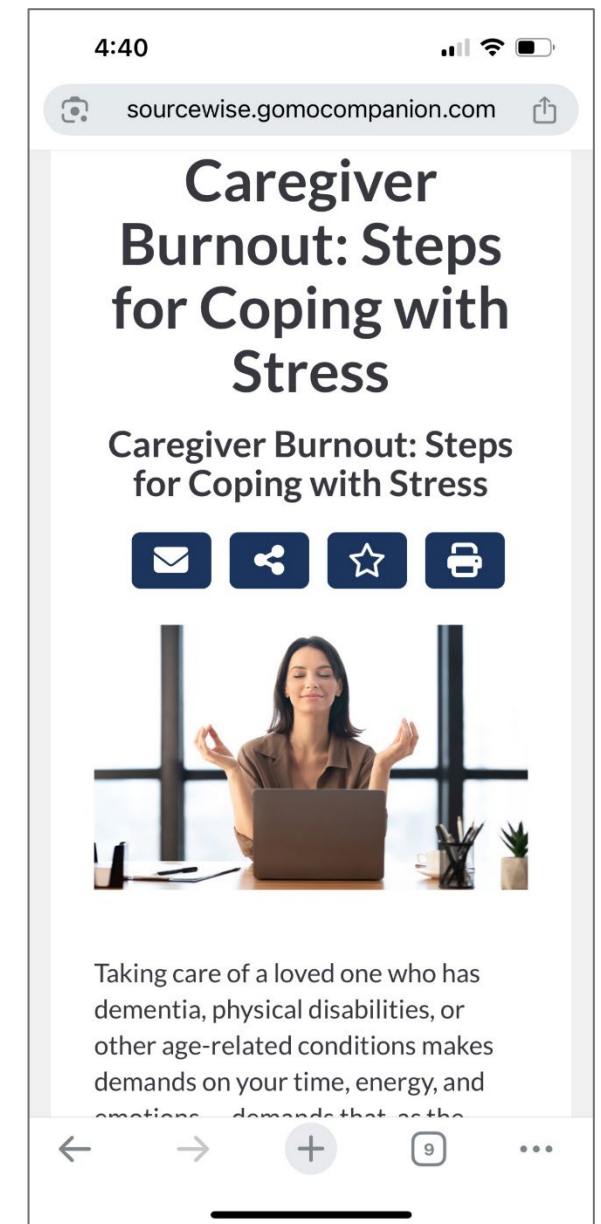
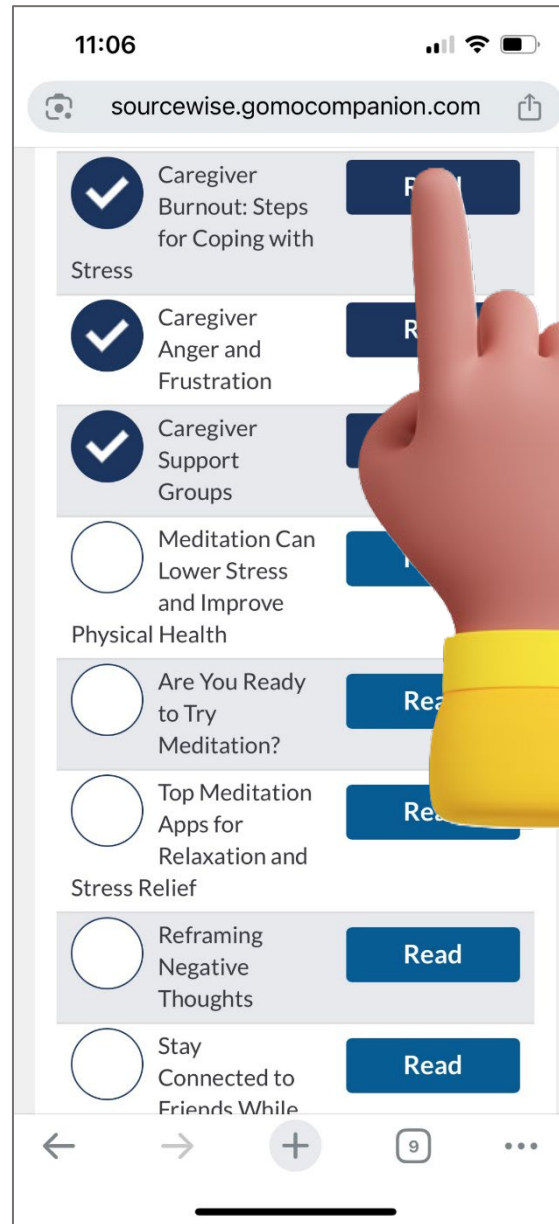
Intake Form Responses:

Caregiver First Name: John [redacted]
Caregiver Last Name: Caregiver [redacted]
Cellphone Number: 408-123-4567 [redacted]
Caregiver's Email Address: john@caregiver.com [redacted]
Caregiver Zip Code: 95117 [redacted]

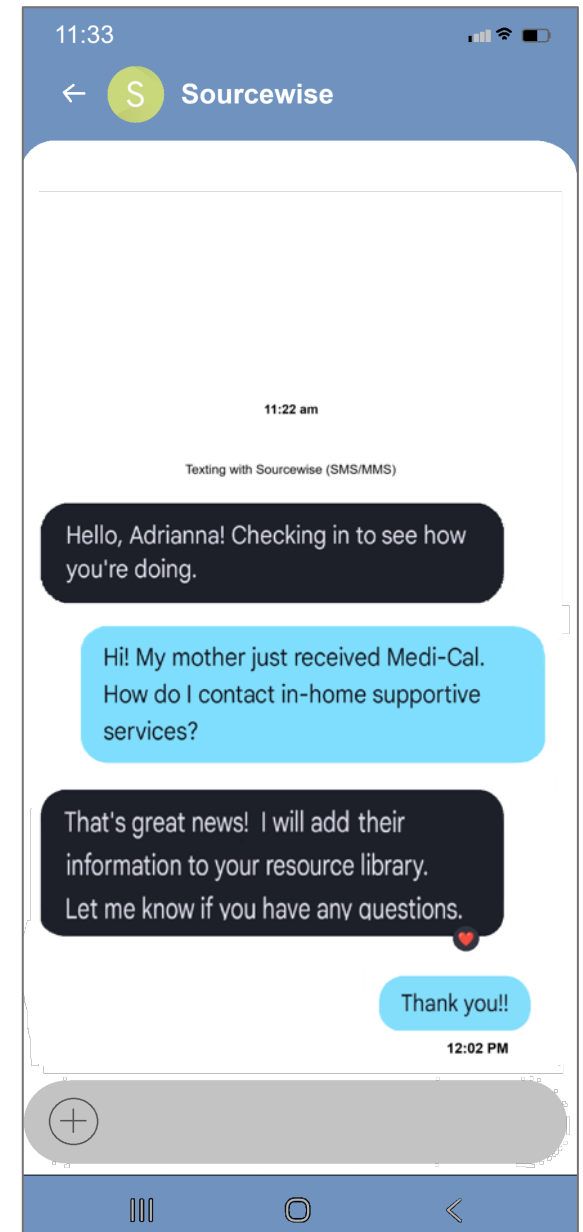
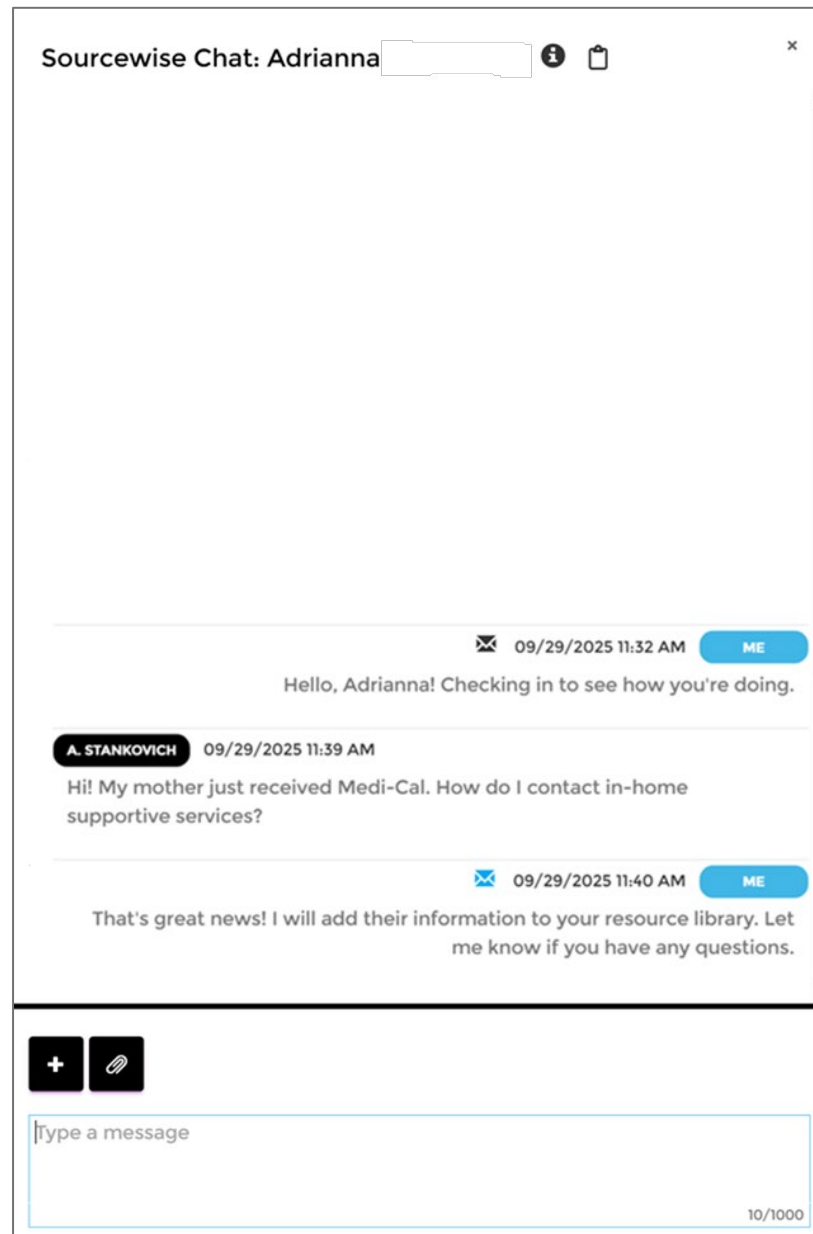
Accessing Companion



Accessing Companion



Texting with a client



Adding items to the companion

Caregiver To-Do List

Cell Phone Number *

(used to sign up for the program)

(408) 123-4567

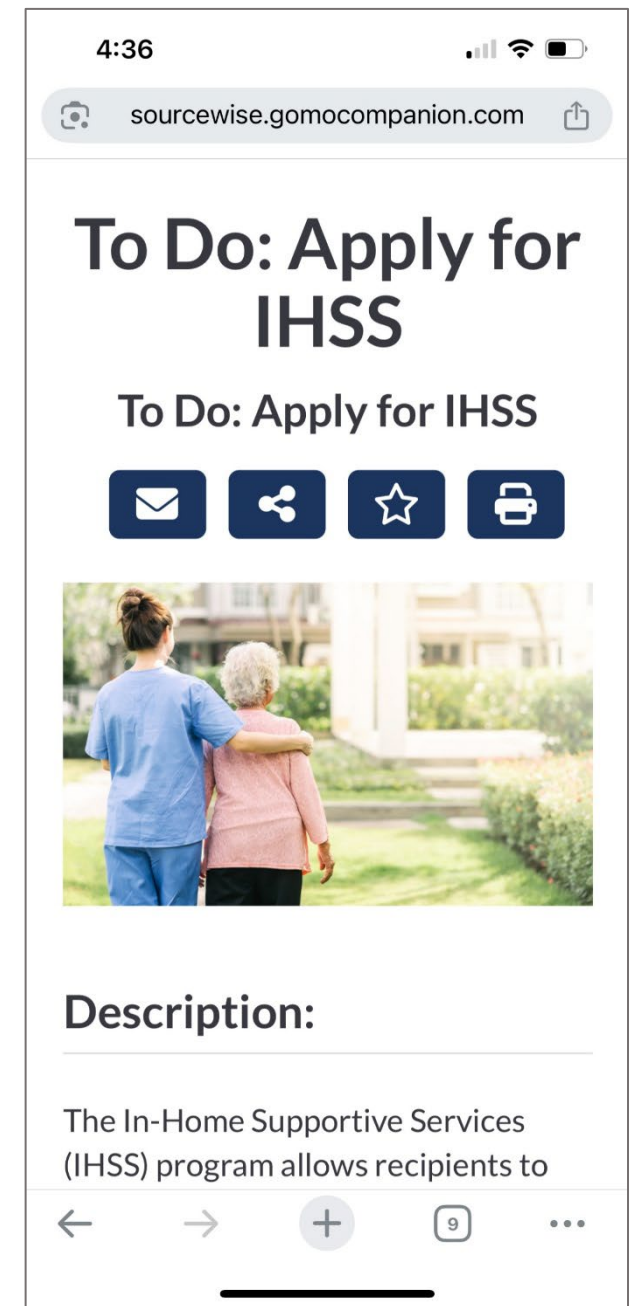
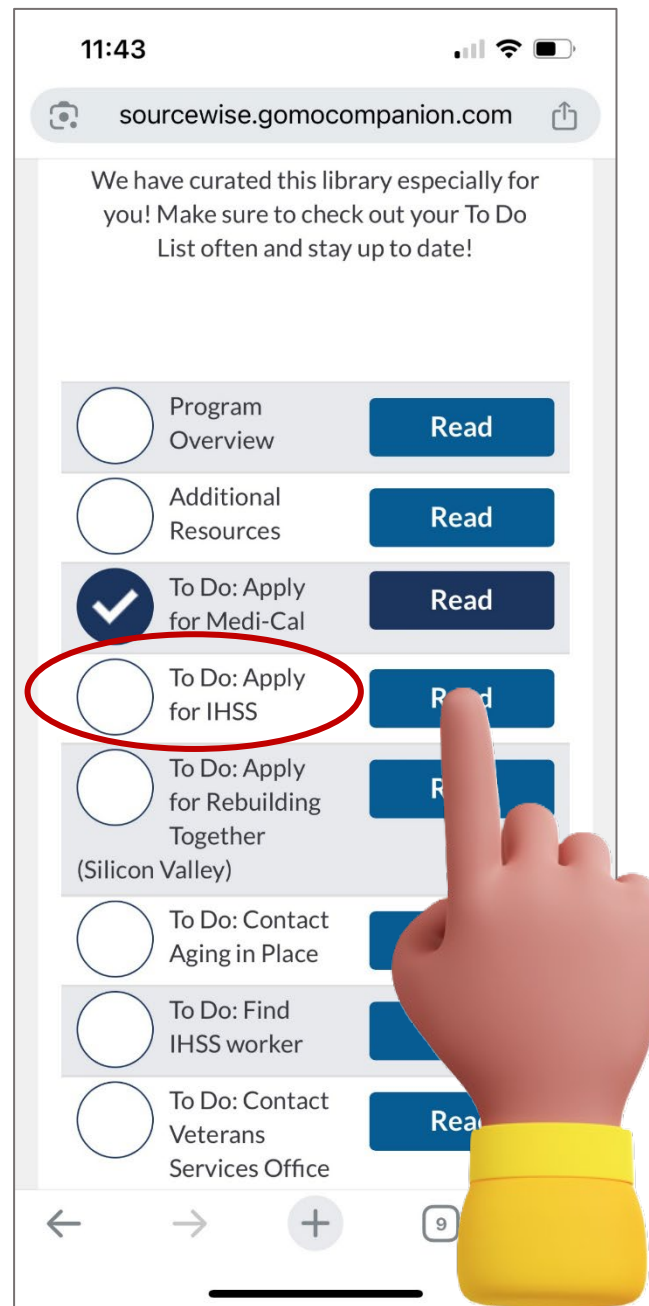
Please select all caregiver assignments/action items you would like to add to the Caregiver's MyPlan Library *

(Select all that apply)

- | | | |
|---|---|--|
| ☐ Maintain Paper Medication List | ☐ Apply for ACCESS | ☐ Connect with Sourewise Transit Service |
| ☐ Apply for Medi-Cal | ☐ Follow up with Medi-Cal | ☒ Apply for IHSS |
| ☐ Follow up with IHSS | ☐ Apply for Rebuilding Together (Silicon Valley) | ☐ Apply for Rebuilding Together (Peninsula) |
| ☐ Contact Farewell to Falls | ☐ Contact Dignity at Home | ☐ Review Checklist for Fall Risk |
| ☐ Arrange Financial Power of Attorney | ☐ Arrange Advanced Healthcare Directives | ☐ Arrange Food Resources |
| ☐ Apply for CalFresh | ☐ Contact Caregiving Agency | ☐ Find IHSS worker |
| ☐ Contact Veterans Services Office | ☐ Contact Adult Day Center | ☐ Contact Adult Day Health Center |
| ☐ Submit W9 | ☐ Apply for Meals on Wheels | ☐ Blood Pressure Log Template |
| ☐ Blood Sugar Log Template | ☐ PT exercises Log Template | ☐ Contact Emergency Response System |
| ☐ Access Personalized Caregiver Training and ... | | |

SUBMIT

Client accesses the To-Do List Item



Expansion & New Partnership



Thank you for your time!

Question & Answer



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upcoming events, program/service updates & more!*



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