

Delaware Aging and Disability Resource Center 2009-2010

**Overview of AOA Grant
Award & Plans for a
Delaware ADRC**

**Lead Partner Meeting
October 2009**

Delaware ADRC Project Agenda

National ADRC Initiative

DE ADRC Grant & Award 2009

Budget, Work Plan, Timeline

Project Management

DE ADRC Lead Partners

Letters of Support: Level of Commitment

Initial Action Steps: Nov. 2009

DE ADRC Project Update

Status Update: Oct. 2009

Next Steps: Nov/Dec. 2009

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National ADRC Initiative

Overview

National ADRC Initiative *Overview*

Overarching Goal of ADRCs

Empower individuals to make informed decisions about their long-term service & support options & to streamline access to existing services & support.

AOA & CMS Joint Initiative

See Title II & IV of Older Americans Act

National ADRC Initiative

Purpose

- **Awareness:** *provide information about the array of long-term support services & options*
- **Assistance:** *empower people to make informed choices, based on personal preferences*
- **Access:** *facilitate access to long-term support services & options*

National ADRC Initiative

Core Functions

- 1. Information & Awareness***
- 2. Options Counseling***
- 3. Streamlined Access to Public Programs***
- 4. Person-Centered Hospital Discharge Planning***
- 5. Quality Assurance & Evaluation***

ADRC Core Function #1

Information & Awareness

- An ADRC serves as a highly visible & trusted place where people of all ages, incomes & disabilities can receive ***information & assistance*** on a full range of long-term support options.
- An ADRC is defined by its ability to promote options among ***underserved, hard-to-reach & private paying populations***.

ADRC Core Function #2: *Options Counseling*

- An ADRC provides ***Options Counseling*** to anyone seeking assistance with long term support services – both ***public & private***.
- ***Options Counseling*** is an interactive decision-support process providing consumers & their families &/or caregivers, with “***one-on-one***” counseling as needed.
- ***Options Counseling*** empowers consumers to identify & understand their needs; assist in making informed decisions about long-term support ***choices*** - based on ***person-centered*** needs, preferences, values & *individual circumstances*.

ADRC Core Function #3: *Streamlined Access to Public Programs*

- An ADRC serves as the ***one-stop access point*** for all publicly-funded long-term care supports, including those funded by Medicaid, Older Americans Act or other state revenue programs.
- An ADRC ***streamlines access*** to the full range of public service options in the State.
- Requires protocols/procedures to ***facilitate integrated access*** (i.e. client intake, needs assessment, care planning, eligibility & service delivery).

ADRC Core Function #4: ***Person-Centered Hospital Discharge Planning***

- An ADRC creates formal linkages to facilitate access to long-term care supports in “critical pathways”, including **hospital discharge planning**.
- Linkages ensure people have information needed to make informed decisions about support options through critical transition points in the health & long-term support system.
- Promotes person-centered, home & community based services.

ADRC Core Function #5: *Quality Assurance and Evaluation*

- An ADRC has a system in place to ensure the **quality** of all services & to **evaluate** outcomes & costs.
- Establishes performance goals & indicators related to:
 - ADRC **Systems**: *Visibility, Trust, Ease of Access, Responsiveness to Needs*
 - ADRC **Programs**: *Efficiency & Effectiveness*
(i.e. ability to implement methods that enable money to follow the person)



National ADRC Initiative Background & DE Timeline

2003-2008

- ADRC's are established in most states & US territories (47).
- DE partners & state agencies mobilize to establish ADRC in DE

2008 (July – September)

- DSAAPD applies for/does not receive federal funds for an ADRC.

2009 (January – October)

- DSAAPD works with national technical support team to assess readiness & develop plans for a DE ADRC.
- DSAAPD & partners engage in research & training to prepare for the implementation of a statewide ADRC.
- DSAAPD applies for/receives AOA grant to establish a DE ADRC.
- DSAAPD initiates plans to establish a Delaware ADRC.



National ADRC Initiative

2009 AOA Grant Opportunity

- Grantor Agency:
- Grant Period:
- Grant Amount:
- Eligibility:
- Matching Requirement:
- Application Due Date:
- Project Start Date:
- Administration on Aging
- 3 Years
- Up to \$750,000 (\$250,000 per year for 3 years)
- State agency
- 5%
- August 10, 2009
- September 30, 2009



National ADRC Initiative

2009 ADRC Grant Requirements

Five Core ADRC Operational Functions per Grant:

- 1. Information & Awareness***
- 2. Options Counseling***
- 3. Streamlined Access to Public Programs***
- 4. Person-Centered Hospital Discharge Planning***
- 5. Quality Assurance & Evaluation***

Letters of Commitment:

- 1. State Medicaid Agency***
- 2. State Health Insurance Counseling Program (SHIP)***
- 3. Centers for Independent Living (CILs)***



DE ADRC Grant Award 2009

Model

Project Management
Budget, Work Plan, Timeline

2009 Delaware ADRC Grant *Summary*

- **Applicant Agency:** DSAAPD
- **Target Populations:**
 - Adults with physical disabilities, age 18+
 - Older adults, age 60+
- **Program Partners:** 8 Lead Partners, including community & state government agencies
- **Grant Timeline:** Submitted on July 27, 2009

2009 Delaware ADRC Grant

Applicant: *DSAAPD*

- Project Start Date: ● 9/30/2009
- Project End Date: ● 9/29/2012
- Federal Funds: ● \$749,954.
- State Funds: ● \$ 63,329.
- Total Funds: ● \$813,283.
- Submission Date: ● 7/27/09



2009 Delaware ADRC Grant Award: *DSAAPD*

- Awarding Agency
- Assistance Type
- Type of Award
- Project/Budget Period
- Total Approved
- Federal Award
- Non-Federal Share
- AOA
- Cooperative Agreement
- Demonstration
- 9/30/2009 - 9/29/2010
- \$247,967. (1st Year)
- \$228,854.
- \$ 19,113.



2009 Delaware ADRC Grant Award *Details*

Project/Budget Period: 36 months. Budget certified for 1st year only; 2nd & 3rd year funding dependent on availability of funds.

FY 2009 Plan: FY 2009 amount of Federal funding (\$228,854.) is less than amount requested; adjustments reflect a maximum FY 2009 funding level. Match requirement lowered to reflect reduced requirement.

Cooperative Agreement: a financial assistance mechanism with substantial AOA programmatic involvement. Award subject to requirements & responsibilities set forth in Coop. Agreement (HHS-2009-AOA-DR-0915).

Reporting Requirements:

- SF-269/Financial Status Report (Long Form) - due annually
- AOA Program Progress Reports (SART) - due semi-annually

Delaware ADRC Model *Overview*

- DSAAPD will operate ADRC statewide.
- Emphasis will be on improving access to long-term support information & services.
- Information & services will be available to target populations, regardless of income.
- Partners will support core program function


2009 Delaware ADRC Project Project Management

- **DE ADRC Project Management:** DSAAPD
- **DE ADRC Governance:** Governor's Advisory Council on Aging & Adults with Physical Disabilities (GAC)
- **DE ADRC Lead Support:** Lead Partners (8)
- **Community Support:** Delaware stakeholders, consumers & general public

2009 Delaware ADRC Project

3 Year Work Plan & Timeline

- **Goal:** *Provide a one-stop access point for long-term care services & supports for older persons & adults with physical disabilities in Delaware.*
- **Measurable Outcome(s):** *Provision of Information & Awareness, Options Counseling & Streamlines Access to services through a statewide ADRC.*
- **Major Objectives & Timeline:** *Year 1–3*

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DE ADRC Lead Partners

Letters of Support

Initial Action Steps

DE ADRC Project: Lead Partners

Letters of Support

- 1. Division Medicaid & Medical Assistance (DMMA)***
- 2. Elder Info, Delaware's State Health Insurance Assistance Program (SHIP)***
- 3. Freedom Center for Independent Living, Inc. (CIL)***
- 4. Independent Resources, Inc. (CIL)***
- 5. Delaware Aging Network (DAN)***
- 6. Christiana Care Health Services (CCHS)***
- 7. State Council for Persons with Disabilities (SCPD)***
- 8. Governor's Advisory Council on Services for Aging & Adults with Physical Disabilities (GAC)***

Lead Partners

Summary of Support

How:

- **Technical Assistance:**
- **Partners Meetings & Partnership Forums:**
- **Cross-training:**
- **Outreach:**
- **Searchable database:**
- **Streamlined Access:**

Details:

- Issue experts, resources
- National/State Webinars, trainings, teleconferences
- Training plans, programs
- Plans, resources, activities
- Resources, updates
- Refer to &/or accepts referrals from DE ADRC

Division of Medicaid & Medical Assistance (DMMA)

DMMA agrees to provide support as follows:

- Serve as Medicaid program issue experts
- Cross-train DE ADRC staff & partners
- Plan & develop strategies with DSAAPD to expedite Medicaid applications through DE ADRC

Department of Insurance ELDERinfo (SHIP)

ELDERinfo agrees to provide support as follows:

- Serve as Medicare & Medicaid program issue experts
- Cross-train DE ADRC staff, partners & volunteers
- Assist in outreach events/activities
- Disseminate DE ADRC resource materials
- Link to DE ADRC website
- Refer to & accept DE ADRC referrals

Freedom Center for Independent Living, Inc. & Independent Resources, Inc.

Delaware CILs agree to provide support as follows:

- Serve as issue experts about people with disabilities
- Assist in developing DE ADRC materials
- Cross-train DE ADRC staff & partners
- Update DE ADRC searchable database
- Assist in outreach events/activities
- Refer to & accept DE ADRC referrals

Delaware Aging Network (DAN)

DAN agrees to provide support as follows:

- Serve as issue experts for adults age 60+
- Assist in developing DE ADRC materials
- Cross-train DE ADRC staff & partners
- Update DE ADRC searchable database
- Assist in outreach events/activities
- Refer to & accept DE ADRC referrals

Christiana Care Health Services (CCHS)

CCHS agrees to provide support as follows:

- Serve as issue experts on hospital discharge planning
- Cross-train DE ADRC staff & partners
- Assist in developing outreach materials about person-centered hospital discharge planning
- Disseminate DE ADRC info to patients & caregivers
- Coordinate with DE ADRC partners to support person-centered discharge planning efforts

State Council for Persons with Disabilities (SCPD)

SCPD agrees to provide support as follows:

- Assist in planning & development of the DE ADRC
- Assist in cross-training of staff & partners
- Review DE ADRC materials
- Assist in outreach events/activities
- Provide forum for planning

Governor's Advisory Council on Services for Aging & Adults with Physical Disabilities (GAC)

GAC agrees to provide support as follows:

- Serve as primary advisory body for the implementation of the DE ADRC
- Council meetings are held 7 months per year
 - *add DE ADRC as standing agenda item*
- Provide technical support & assist with special projects to DSAAPD & partners

Lead Partners

Initial Action Items (November 2009)

November 2009

- Review Grant, Budget, Work Plan, Timeline.
- Confirm DE ADRC Project Lead Contacts or designees.
- Participate in ongoing DE ADRC Partner meetings (TBD).
- Sign-up on ADRC-TAE website: www.ADRC-TAE.org.
- Participate in national ADRC webinars, teleconferences & trainings for new grantees (Oct. 28 & Nov. 5, 2009).
- Participate in DE ADRC Planning Workgroups/Ad Hoc Committees (Training, Outreach, Partnership Forum).



DE ADRC Project Update
October 2009
November 2009
Next Steps

DE ADRC Project

October 2009 Activities

- Announce AOA grant award; posted on DSAAPD website.
- Initiate DE ADRC Project planning & development.
- Establish DE ADRC Project management.
- Confirm Project Officer & ADRC-TAE consultant. Participate in grantee webinars, trainings, teleconferences. Confirm reporting requirements.
- Meet with Gov.'s Advisory Council, Lead Partners, DSAAPD staff.
- Review DE ADRC work plan, budget, deliverables & timelines.
- Develop detailed work plans per major objective/task.
- Establish workgroups/Ad Hoc committees & Lead Contact(s).
- Initiate DE ADRC infrastructure development at DSAAPD:
 - Call Center & Telephone System Procurement & Installation
 - Computer Assessment & Performance Report
 - ADRC-TAE webinars & Technical Support

DE ADRC Project

November 2009 Activities

- Establish project management & timeline (continue).
- Confirm detailed work plans, responsibilities & timelines.
- Confirm & mobilize Project Leads & workgroups/Ad Hoc Committees; Confirm & post meeting schedules.
- Initiate DE ADRC training/cross-training.
- Participate in ADRC-TAE webinars (Nov.5;Dec.3) & teleconferences.
- Initiate MOUs with State Agencies (DMMA, ELDERinfo).
- Develop RFPs for specified DE ADRC services.
- Initiate plans for DE ADRC Partnership/Stakeholder Kick-off Forum.
- Implement next phase of DE ADRC infrastructure development.
- Report progress.

DE ADRC Project

Next Steps

Top Priorities (Nov/Dec 2009)

- *Initiate DE Project Planning with all Project Leads (DSAAPD, Lead Partners, GAC)*
- *Designate E-mail Address (DSAAPD)*
- *Designate Telephone Number (DSAAPD)*
- *Plan Open Forum for all stakeholders & consumers (w/national ADRC project lead)*

DE ADRC Lead Partners

Lead Representative &/or Designee

- **Division of Medicaid & Medical Assistance: Rosanne Mahaney, Director**
- **ELDERinfo (SHIP): Lokia Turner, Director**
Dept. of Insurance: Karen Weldin-Stewart, Delaware Insurance Commissioner
- **Freedom Center for Independent Living: Ernie G. Cole, Ed.D., Exec. Director**
- **Independent Resources: Larry Henderson, Exec. Director**
- **Delaware Aging Network: Susan Getman, Chair; William Kooser, Vice Chair**
- **Christiana Care Health Services: Gary W. Ferguson, Exec. VP & CEO;**
Linda Brittingham, Director of Social Services
- **State Council for Persons with Disabilities: Daniese McMullin-Powell, Chair;**
Kyle Hodges, Administrator
- **Governor's Advisory Council on Services for Aging & Adults with Physical Disabilities: C. Regina Byers, Chair**

Division of Services for Aging & Adults with Physical Disabilities

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