The LEWIN GROUP®

HEALTH CARE AND HUMAN SERVICES POLICY, RESEARCH, AND CONSULTING - **WITH REAL-WORLD PERSPECTIVE**.

Aging and Disability Resource Centers: A Growing National Trend

Christina Neill Bowen, Gilbert Thompson
April, 9 2009

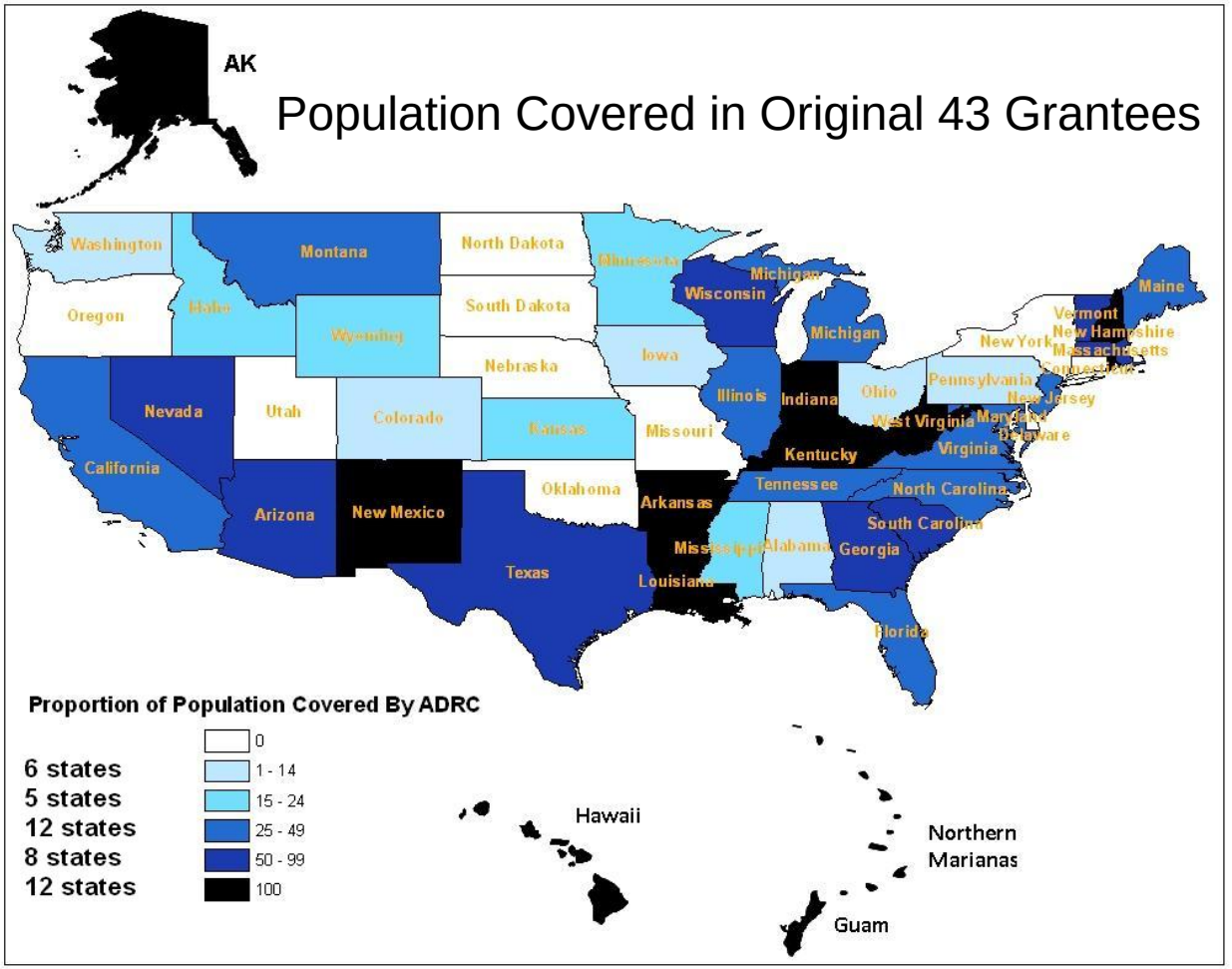
Purpose of Today's Meeting

- Define Aging and Disability Resource Centers
- Share experiences and lessons learned from other states
- Generate momentum for Delaware's planning for and implementation of the Aging and Disability Resource Center (ADRC)

ADRCs are Sustaining and Expanding

198 ADRCs
In 43 Grantee
States &
Territories
Cover
38% of U.S.
Population

CT, MO,
OR & NY
also
established
ADRCs



Technical Assistance Exchange

- **Technical Assistance Resources**
  - Website
  - Resource Materials (e.g. Issue Briefs)
  - National Meetings
  - Weekly Electronic Newsletters
  - Grantee Surveys
  - Examples from the Field
- **Building a Grantee Community**
  - Monthly Teleconferences/Web casts
  - Bi-monthly Workgroup Teleconferences
  - On-line Discussions
  - Electronic Bulletin Board

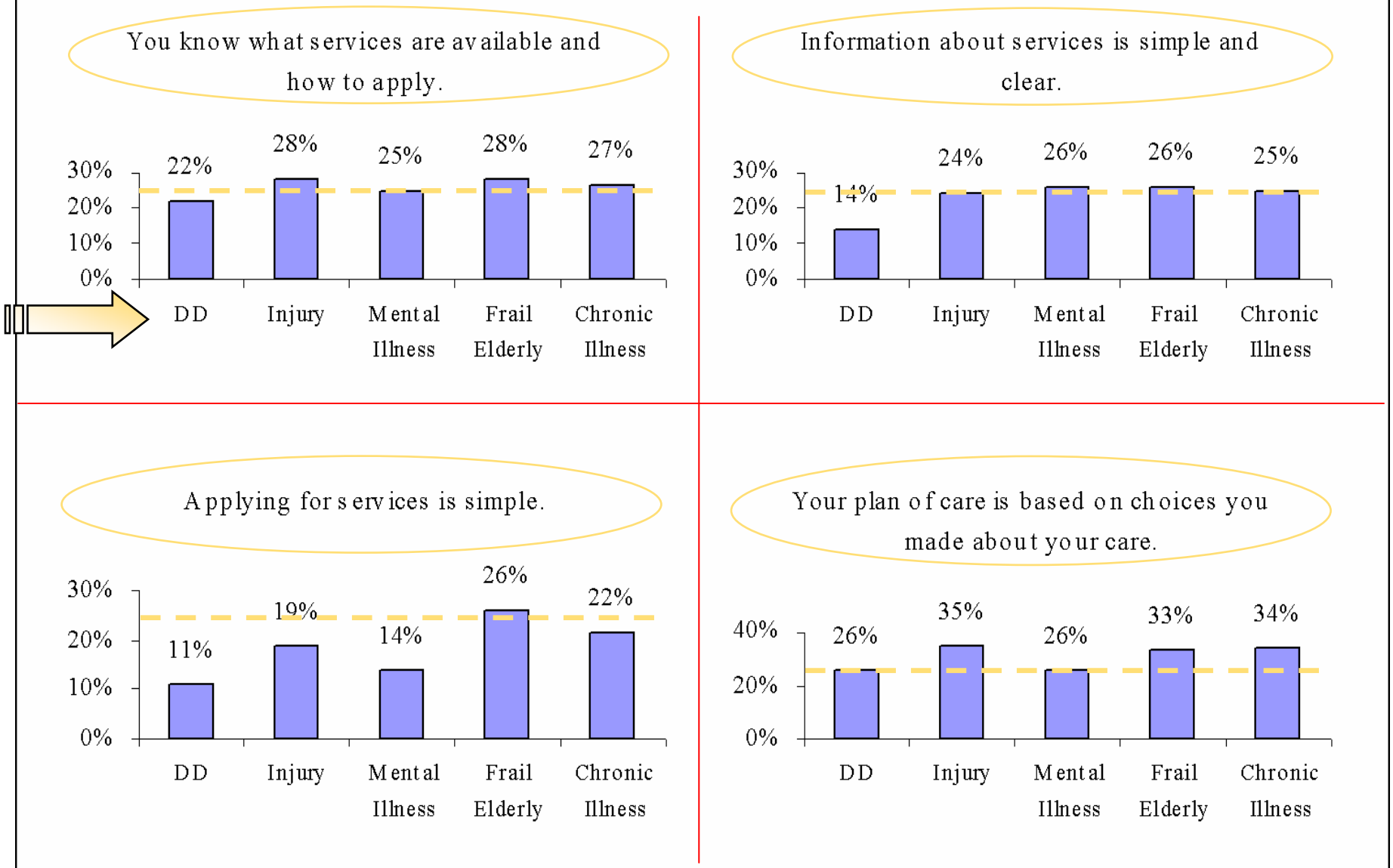
SPEED
BUMP

Why ADRC or Single Entry Point?

- Navigating the system is difficult
- With choice can come confusion
- Consumers may never know what other options are available

ADRCs build consumer trust by enhancing individual choice, supporting informed decision-making and streamlining access to services.

FIGURE 1. PERSONS AGREEING WITH THE FOLLOWING STATEMENTS, BY DISABILITY (N=489).



South Carolina Lt. Governor's Office on Aging - 2003

History of ADRC Initiative

1990 – Americans with Disabilities Act (ADA)

1999 – Olmstead Decision

2001 – New Freedom Initiative (NFI)

2003 – Aging and Disability Resource Center Initiative

2006 – Older Americans Act Reauthorization

2006 – Choices for Independence

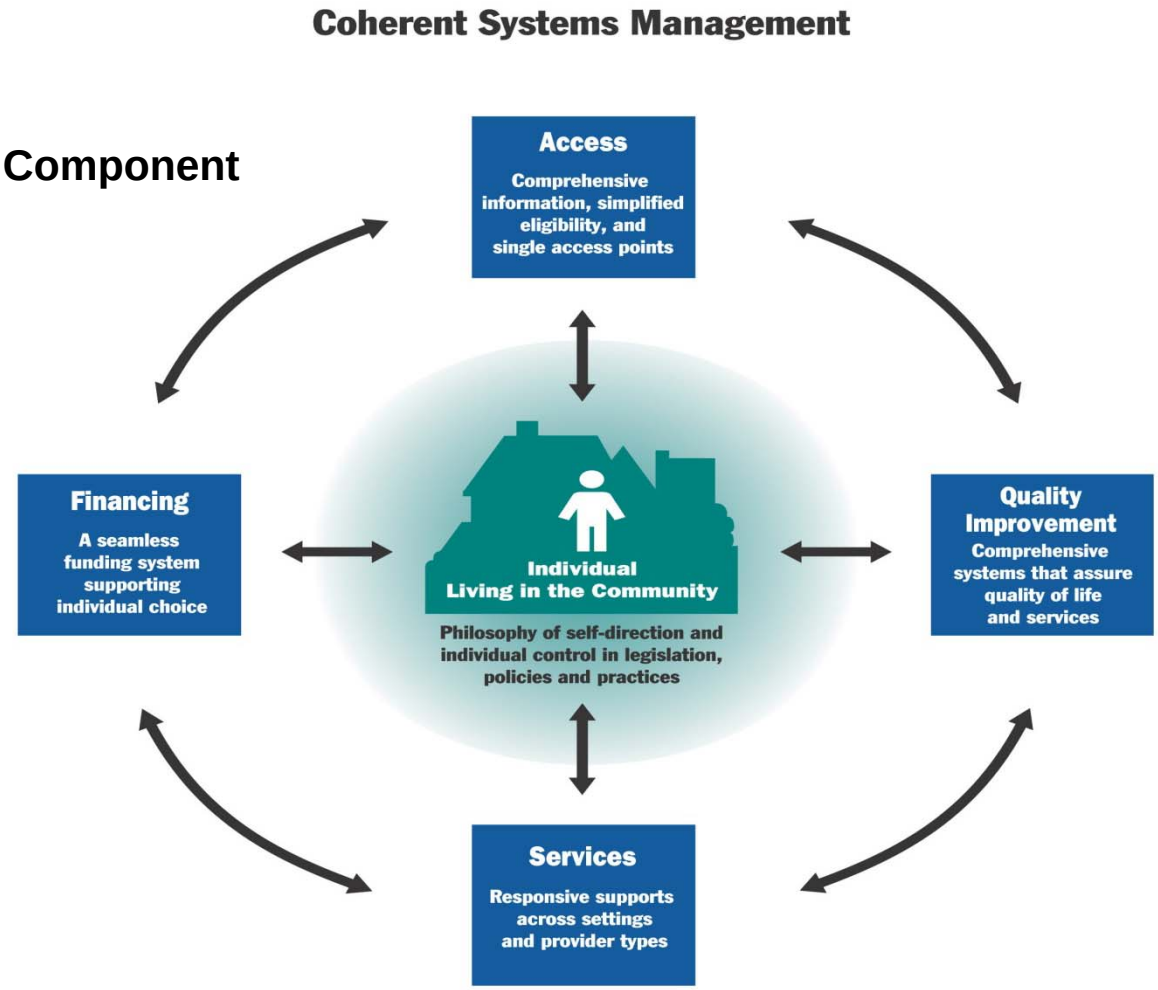
AoA's Vision for ADRCs

- In every community in the nation
- **Highly visible** and **trusted** places
- Serving people of **all incomes and ages**
- Providing information on the **full range** of long term support options

A **single point of entry** for access to public long term support programs and benefits.

CMS Vision

ADRC = Access Component



Defining Characteristics

- Seamless system from consumer perspective
- High level of visibility and trust
- Proactive intervention into LTC pathways
- Integration of aging and disability service systems
- Formal partnerships across aging, disability and Medicaid agencies
- All income levels served

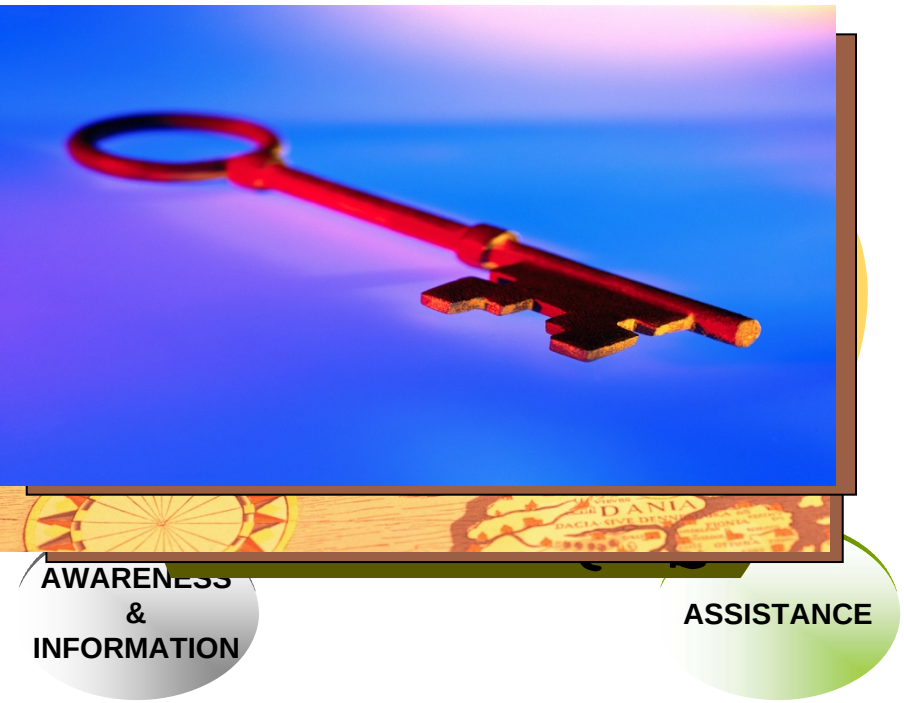
More a process than an entity

It's The Network℠

SEP Perspective from the ~~Outside~~ Inside

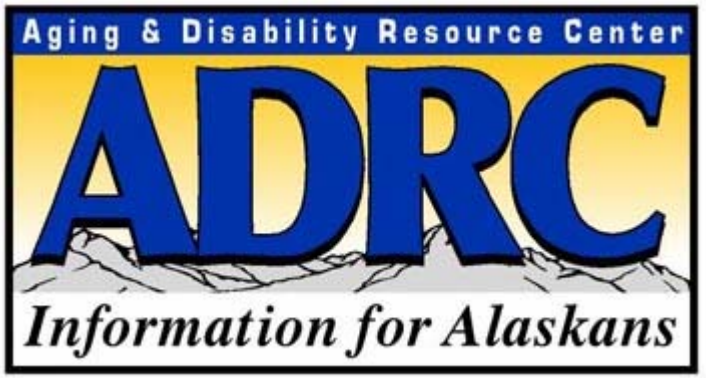
Effective ADRC partnerships

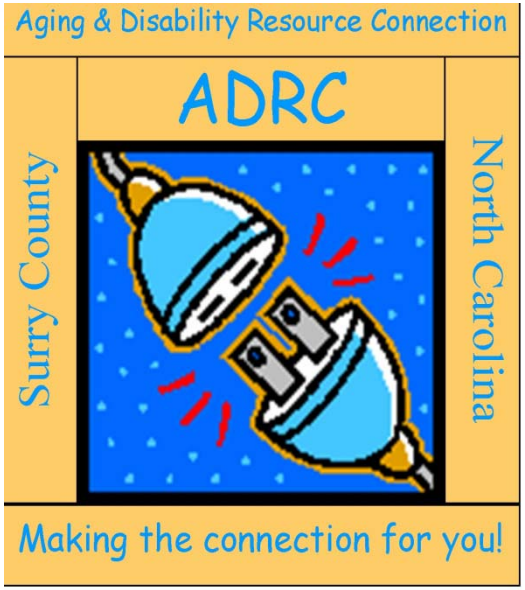
- Regular communication
- Written agreements
- Written referral protocols
- Co-location of staff
- Regular cross-training of staff
- Compatible IT systems
- I&R resources are shared
- Collaboration on client services
- Client data are shared
- Joint marketing and outreach activities



- **Awareness & Information**
  - Public Education
  - Information on Options
- **Assistance**
  - Options Counseling
  - Benefits Counseling
  - Employment Options Counseling
  - Referral
  - Crisis Intervention
  - Planning for Future Needs
- **Access**
  - Eligibility Screening
  - Private Pay Services
  - Comprehensive Assessment
  - Programmatic Eligibility Determination
  - Medicaid Financial Eligibility Determination
  - One-Stop Access to all public programs

Examples of Marketing Materials





ADRC's Best Strategies for Awareness

- Target critical pathways
- Advisory boards and coalition members serve as ambassadors
- Advertisement through various media outlets and at multiple locations
- Public service announcements (PSA)
- Presentations at senior centers, community and health fairs, exhibits at governmental events and functions, conferences
- Publications/Websites
- Customer service

Effectiveness of Marketing Strategies

- Documented increased number of contacts over time
  - *On average, ADRCs report over a 300% increase in contacts after the first six months of operation*
- Observed increase in service provision since the ADRC opened
- The number of new, diverse clients they are serving such as new target groups, private-pay individuals, ethnic groups, etc.
- Increases in referrals made to other organizations

What is Options Counseling?

Long-Term Support Options Counseling is an interactive decision-support process whereby consumers, family members and/or significant others are supported in their deliberations to determine appropriate long-term support choices in the context of the consumer's needs, preferences, values, and individual circumstances.

Aging and Disability Resource Centers in Wisconsin

Streamlining Access Strategies

- Staff training on private services and public benefits
- Collecting some financial information from consumers to determine whether application is appropriate
- Assisting consumers complete applications, gather documentation, submit applications
- Developing formal referral protocols with providers and partners
- Data sharing - Over 3/4 s of ADRCs can track consumers through system

Strategies (cont)

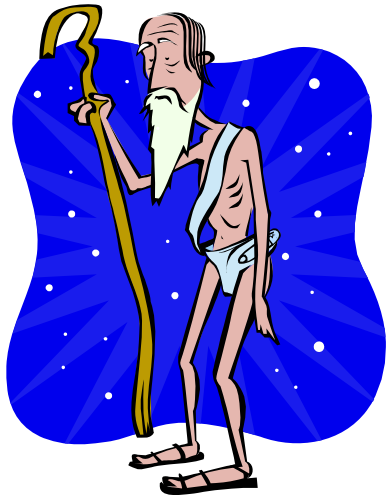
- Enhance telecommunication systems to allow for "warm transfers"
- Co-located functional (40%) and/or financial eligibility staff (25%)
- On-line applications
- Shortened or simplified application forms
- Integrated assessment and eligibility forms (programs and populations)
- "Presumptive" or "fast track" eligibility process for at-risk populations

Virtual Tour: New Hampshire

Role of Information Technology

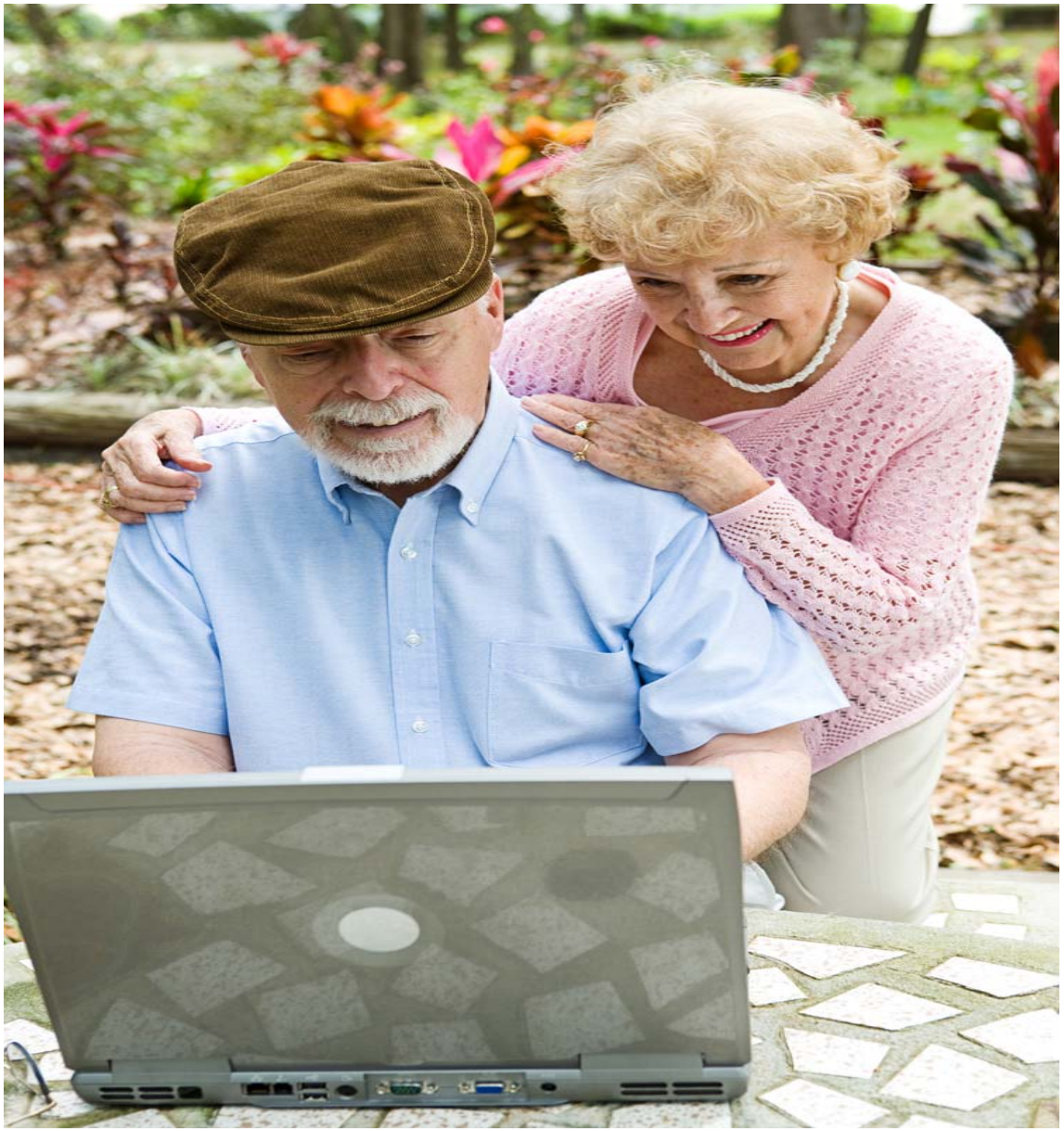
- **Information and Referral**
- **Online Applications**
  - *34 states with internet applications; 7 complete & submit online; 4 in process for online submission)*
- **Client tracking**
- **Integrating IT/MIS databases among departments and across agencies**
- **Developing public websites (all ADRCs have some web presence)**
  - *Web-based resource directories*
  - *Online decision tools – 16 developed; 15 in development*
- **Portable technology**
  - *Data entry & scanning documentation*
  - *8 states use laptops in the field; 3 use potable scanners and photography*

Sustainability Happens

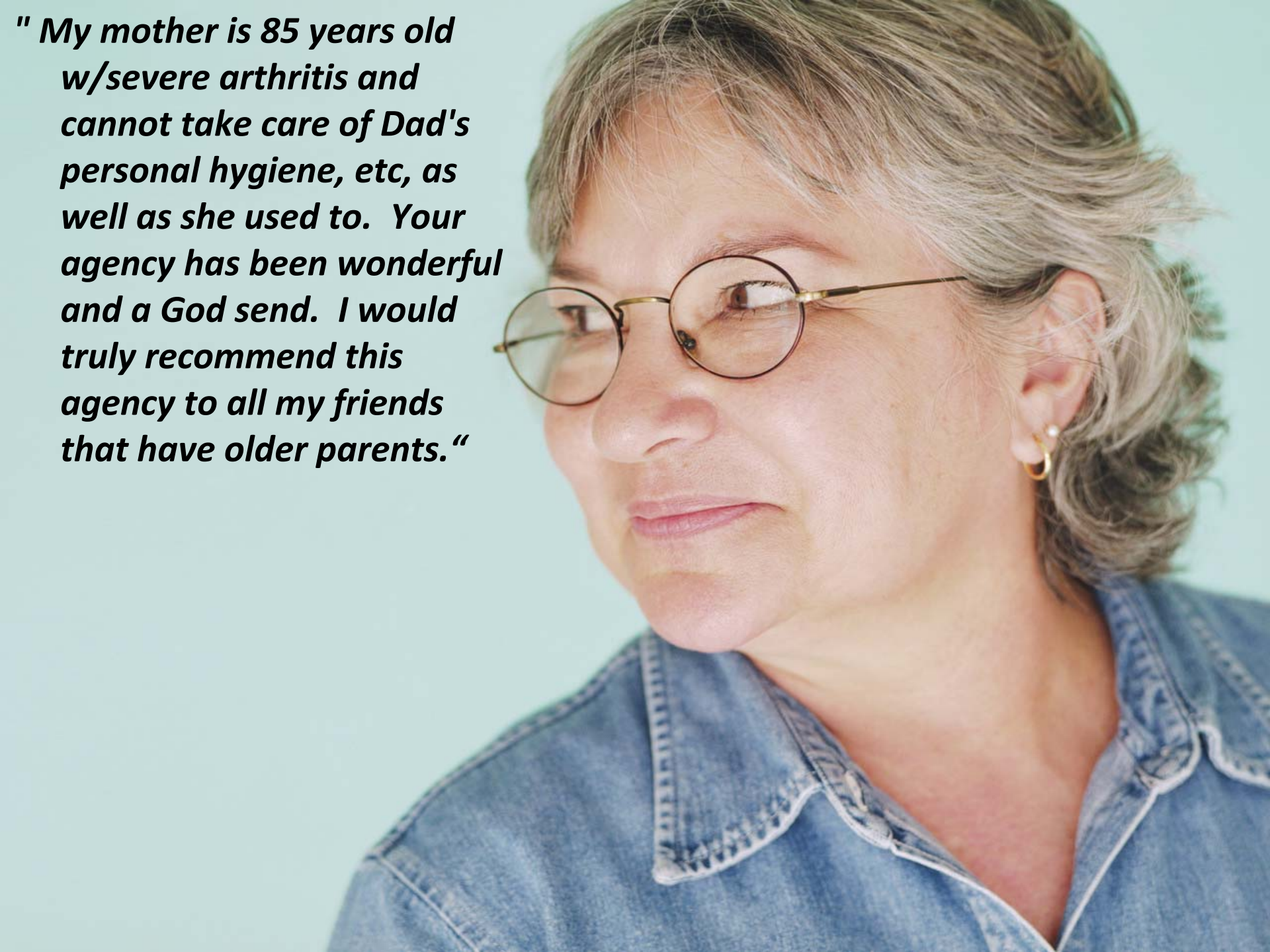


- Over half of the 43 grantees passed legislation, developed executive guidance, and/or contributed state funds
- Approximately $43M in financial support from public and private sectors for program development and expansion
- New and unexpected partnerships have been developed to enhance program activities
- ADRCs have been expanded to multiple pilot sites and statewide in many states

"Thanks for going the extra mile. I was at the end of my rope in terms of what I could do for this client. It's great to have an agency like yours to turn to when we're out of options."



"I never knew that this could be so easy and pleasant. I was expecting something far more bureaucratic and difficult!"


" My mother is 85 years old w/severe arthritis and cannot take care of Dad's personal hygiene, etc, as well as she used to. Your agency has been wonderful and a God send. I would truly recommend this agency to all my friends that have older parents.“

“I don’t know how much you get paid, but it isn’t enough!

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March 25, 2009
Technical Assistance Exchange Newsletter

A Weekly Update for Aging & Disability Resource Center and Nursing Home Diversion Programs and their Partners

Contact Allison Yudt at The Lewin Group with questions about this newsletter: allison.yudt@lewin.com or 703.269.5504

In This Issue

- Last Chance!
- New Research Report on Disability Trends for Assisted Living Facility Residents
- Update: Technical Assistance Training Calls
- Upcoming TA Events and Website Additions
- 2009 Aging Network and veterans Health Administration Meeting Evaluations

Last Chance!

A survey has been developed by the Center for Personal Assistance Services, an organization providing research, training, dissemination and technical assistance on issues of personal assistance services (PAS).

The survey aims to increase the Center's understanding of the role of ADRCs in connecting seniors and disabled individuals with in-home workers providing personal assistance, home care, and other services such as homemaking, respite, and companionship.

New Research Report on Disability Trends for Assisted Living Facility Residents

The Society of Actuaries' Long-Term Care Insurance Section and the ILTCI Conference Association are pleased to make available a research report exploring functional and cognitive trends among assisted living facility residents. The report, authored by Jessica Miller, Marc Cohen and Xiaomei Shi of LifePlans, Inc., examines data on long-term care policyholders to gain insight into these demographics.

The entire report is available on SOA's website.

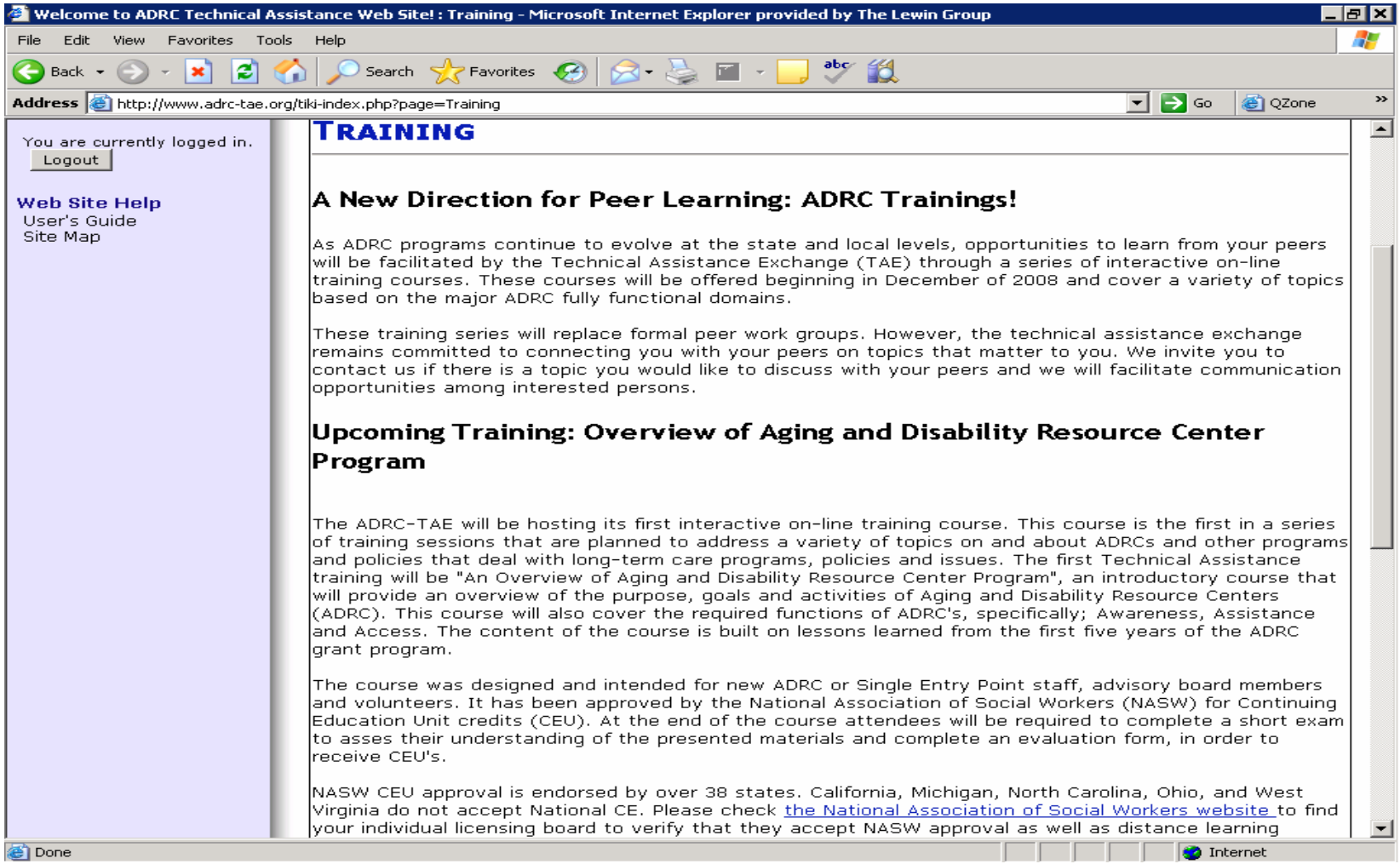
Update: Technical Assistance Online Training

Technical Assistance Exchange training sessions are live webcasts or self-paced courses. Each one requires registration and includes a session evaluation component. The number of participants is limited in some of the training sessions where interaction is a core component of the curriculum.

As indicated in their brief descriptions on the website, some training courses have been approved by the National Association of Social Workers (NASW) for Continuing Education Unit credits (CEU). At the end of the course, attendees will be required to complete a short exam to asses their understanding of the presented materials and complete an evaluation form, in order to receive CEU's. Please check the National Association of Social Workers website to find your individual licensing board to verify that they accept NASW approval as well as distance learning experience.

Hold these dates for upcoming trainings! Click below for more information and registration instructions.

www.adrc-tae.org



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