

Overview of the Aging and Disability Resource Center Program



TRAINING COURSE

Overview of the Aging and Disability Resource Center Program

-  Welcome
-  Introduction to the training course
-  Instructor & Participant Introductions
-  Course format



Overview of the Aging and Disability Resource Center Program

Learning Objectives

-  Understand the policy and legislative factors that shaped development of the ADRC program.
-  Describe the purpose and required functions of ADRCs.
-  Define “single entry points” and understand how ADRCs serve as SEPs to long-term care (LTC) services and supports.
-  Explain the three required activities of ADRCs: Awareness, Assistance and Access, specifically:
 - **Awareness:** how ADRCs have used marketing and outreach strategies to reach target populations
 - **Assistance:** how ADRCs provide assistance to people navigating LTC service systems in their states and locally
 - **Access:** how ADRCs have achieved streamlined access to LTC services and supports

2

Overview of the Aging and Disability Resource Center Program

-  **Module I** **Background and Purpose of the ADRC Program**
-  Module II Characteristics of ADRC Programs: Single Entry Points and Partnerships
-  Module III ADRC Functions: Awareness
-  Module IV ADRC Functions: Assistance
-  Module V ADRC Functions: Access
-  Module VI Other Important ADRC Activities: Evaluation & Sustainability

—End of course information



3

Module I: Background and Purpose of the Aging and Disability Resource Center Program

Content Areas

1. History of LTC systems change initiatives
2. Vision and purpose of the ADRC program
3. Map of ADRC programs



Module I: Background and Purpose of the ADRC Program
1. History of Long-Term Care Systems Change

1960-1990 Changing views on institutionalization due to:

- ◆ Advances in medicine and technology
- ◆ Civil rights movement
- ◆ Concerns about costs of care
- ◆ Mid 1980s – Medicaid Home and Community Based (HCBS) Waiver programs begin

Prior to 1990 Reliance on institutional care for people with long-term care needs including those with:

- ◆ Physical disabilities
- ◆ Developmental Disabilities/Intellectual Disabilities (DD/ID)
- ◆ Seniors
- ◆ Others

Module I: Background and Purpose of the ADRC Program
1. History of Long-Term Care Systems Change

1990 – Americans with Disabilities Act (ADA)

- Public programs, services and facilities must be accessible to people with disabilities

1999 – Olmstead Decision

- Services must be provided in the most integrated settings appropriate to individuals' needs

2001 – New Freedom Initiative (NFI)

- Increase access to community life, education, employment and participation for people with disabilities; grant programs established under auspices of NFI include Money Follows the Person, Real Choice Systems Change, Direct Service Worker and Employment initiatives.

2003 – Aging and Disability Resource Center Initiative

- Joint AoA/CMS funding provided to states; to develop single entry point systems enabling people to access long-term care assistance and support with obtaining services

2006 – Older Americans Act Reauthorization

- Authorized continuation of ADRC initiative

2006 – Choices for Independence

- An AoA initiative to continue national and state systems to enable people to live in communities

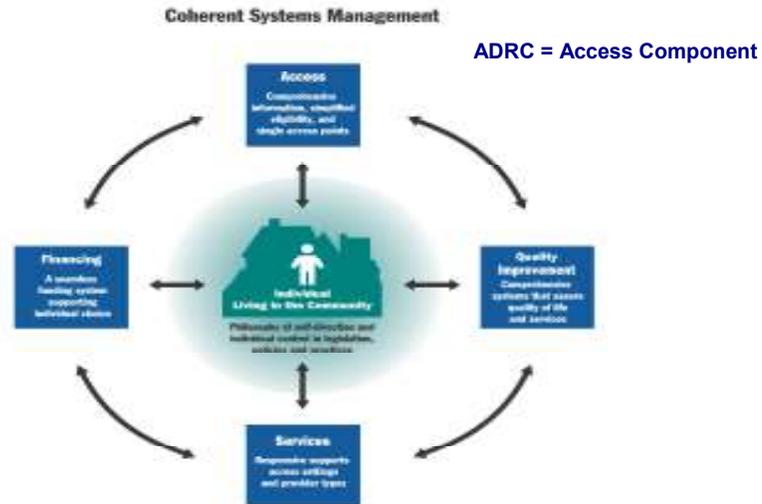


Module I: Background and Purpose of the ADRC Program
2. Vision and Purpose of ADRC program

Vision and Purpose of ADRC program:

To have Aging and Disability Resource Centers in every community serving as **highly visible** and **trusted** places where people of all incomes and ages can turn for information on the full range of long term support options and a **single point of entry** for access to public long term support programs and benefits.

Module I: Background and Purpose of the ADRC Program
2. Vision and Purpose of ADRC program



8

Module I: Background and Purpose of the ADRC Program
2. Vision and Purpose of ADRC program

ADRCs work to:

1. **Simplify** access to information, supports and services
2. **Eliminate** silos that create fragmentation in service delivery
3. **Re-focus** service delivery from institutional to community-based settings



9

Module I: Background and Purpose of the ADRC Program
 2. Vision and Purpose of ADRC program

ADRCs strive to improve access to LTC services and supports

1. Eliminate confusion about where to obtain information, services and supports
2. Reduce unnecessary bureaucracy in obtaining assistance
3. Make sure that the consumer receives comprehensive information about all long-term care options



AGING AND DISABILITY RESOURCE CENTER AWARDEES



Questions?

Overview of the Aging and Disability Resource Center Program

- ✓ Module I Background and Purpose of the ADRC Initiative
-  Module II Characteristics of ADRC Programs: Single Entry Points and Partnerships
-  Module III ADRC Functions: Awareness
-  Module IV ADRC Functions: Assistance
-  Module V ADRC Functions: Access
-  Module VI Other Important ADRC Activities: Evaluation & Sustainability

Content Areas

1. Characteristics of ADRCs
2. The three A's of ADRCs
3. Single Entry Points: Systems and Models
4. Single Entry Points from the Consumers' Perspectives
5. Partnerships (importance, organizations)
6. Practical lessons learned from ADRCs about partnerships

What makes ADRCs different from other organizations??

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

> > > con't

Module II: Characteristics of ADRC Programs:
Single Entry Points and Partnerships

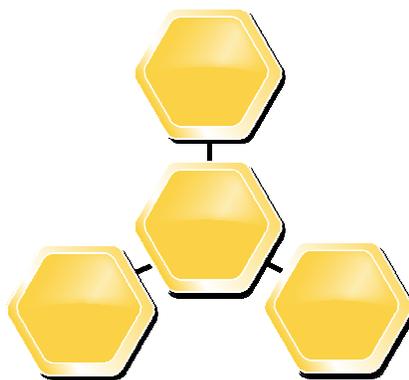
1. Characteristics of ADRCs

-  ADRCs also focus on making investments in IT and MIS -- the goal is to be an organization that facilitates communication between consumers and service providers and that provides streamlined access to information and options for consumers
-  They seek to either directly provide or to coordinate assessment processes and eligibility determination processes such as financial or functional eligibility determinations
-  They make connections with critical pathway providers -- discharge planners, physicians and others who make decisions about transitions from institutional care to community-based care, about remaining independent for as long as feasible with adequate supports
-  They focus on evaluating outcomes to achieve continuous quality improvement in their programs and services

16

Module II: Characteristics of ADRC Programs:
Single Entry Points and Partnerships

2. The Three A's of ADRCs



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



17

Module II: Characteristics of ADRC Programs:
Single Entry Points and Partnerships
3. Single Entry Points: Systems and Models

In performing their three key functions, ADRCs operate as Single Entry Points (SEPs) to long-term care supports and services.

 What are SEPs?

 Why are they important?

Module II: Characteristics of ADRC Programs:
Single Entry Points and Partnerships
3. Single Entry Points: Systems and Models

What are Single Entry Points (SEPs)?

 A Single Entry Point may consist of one organization – the ADRC that serves as the main door in each community through which consumers, family members, and providers can access information, referral, assistance and supports regarding long term care.

 SEPs can also be formed as networks of organizations offering multiple access points through which people can access information, referral, assistance and supports regarding long term care and that, through close coordination, offer services and supports as if they were one organization.

Module II: Characteristics of ADRC Programs:
Single Entry Points and Partnerships

3. *Single Entry Points: Systems and Models*

Whether they are a single organization or a network of organizations, in SEPs, consumers do not have to:

- ⌘ Go somewhere else (the SEP offers “one stop shop”, on-line submission of information, seamless referrals to other agencies)
- ⌘ Call another organization or agency (the SEP offers seamless referral to other agencies, warm transfers, staff call consumers back and track their progress in obtaining services and supports)
- ⌘ Repeat same information over and over again (in an SEP system information populates multiple forms, case notes shared among providers)
- ⌘ Keep calling back (SEPs offer proactive followup after referrals are made)

In SEPs, consumers should feel like they are dealing with one organization

Module II: Characteristics of ADRC Programs:
Single Entry Points and Partnerships

4. *SEPs from the Consumer's Perspective*

Why are SEPs Important?

1. Number of long term support service options has increased dramatically over last 2 decades – with choice can come confusion
SEPs help eliminate confusion in finding LTC options
2. Array of I&R/access points, services, agencies, eligibility criteria and funding sources – navigating the system is difficult
SEPs create one-stop access to LTC services
3. In fragmented service systems, consumers may not have access to information about the comprehensive range of LTC service options available to them
SEPs ensure that comprehensive options are provided to consumers so they can make the decisions that best meet their needs

Why are SEPs Important?

1. Number of long term support service options has increased dramatically over last 2 decades – with choice can come confusion
SEPs help eliminate confusion in finding LTC options
2. Array of I&R/access points, services, agencies, eligibility criteria and funding sources – navigating the system is difficult
SEPs create one-stop access to LTC services
3. In fragmented service systems, consumers may not have access to information about the comprehensive range of LTC service options available to them
SEPs ensure that comprehensive options are provided to consumers so they can make the decisions that best meet their needs



Module II: Characteristics of ADRC Programs: Single Entry Points and Partnerships

5. Partnerships (importance, organizations)

Partnerships enable ADRCs to fulfill their key functions. Partners include:



- Area Agencies on Aging**
- Centers for Independent Living**
- Other aging and disability service providers**
- State Health Insurance Assistance Program (SHIP)**
- 2-1-1**
- Adult Protective Services**
- Medicaid**
- Long term supports and service providers (e.g., home health agencies, nursing facilities)**
- Critical pathway providers (e.g., hospital discharge planners, physicians)**

24

Module II: Characteristics of ADRC Programs: Single Entry Points and Partnerships

6. Practical Lessons Learned About Partnerships



Effective ADRC partnerships are characterized by:

- 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

25

Questions?

26

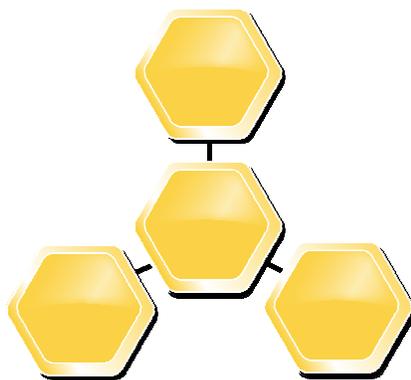
Overview of the Aging and Disability Resource Center Program

- ✓ Module I Background and Purpose of the ADRC Initiative
- ✓ Module II Characteristics of ADRC Programs: Single Entry Points and Partnerships
-  Module III **ADRC Functions: Awareness**
-  Module IV ADRC Functions: Assistance
-  Module V ADRC Functions: Access
-  Module VI Other Important ADRC Activities: Evaluation & Sustainability

27

Content Areas:

1. The three “A’s” of ADRCs and sub-components
 - Awareness and Information
 - Access
 - Assistance
2. Awareness and Target Populations of ADRC Marketing and Outreach
3. Social Marketing ADRC Style
4. Outreach and Marketing Strategies for LTC populations
5. The Effectiveness of ADRC Awareness 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





Primary Target Populations

- Aging population (persons 65 and older)
- Persons with disabilities (persons with physical disabilities, mental retardation, developmental disabilities, intellectual disabilities, mental illness and traumatic brain injury)
- Caregivers (Parents, children, family members, friends)



Secondary Target Populations

- Providers



What is social marketing?

- The application of commercial marketing and communication principles to public initiatives and programs in order to achieve social goals through behavior change



Why is social marketing important?

- Promotes awareness of the ADRCs as a trusted source of information and assistance
- Defines better the target audience's attitudes and perceptions related to ADRCs for effectively communicating with those populations
- Ensures that messages and materials are developed and distributed to the right audience at the right time

Key Marketing Strategies

1. Identify and define Target Audience
2. Research/Segment Target Audience
3. Create and define Messages and Material
 - Gain attention, Hold interest, Arouse desire, Elicit action
 - Vehicles for delivering message (e.g., brochures, print advertisements, PSA's, billboards, newspapers, health fairs, etc)
4. Present materials to a small sample of potential audience
 - Test materials and get feedback.
5. Identify locations and Implement change
6. Evaluate campaign
7. Refine campaign

NOTE: Lesson Learned: Timing is important!! >>>> con't

32

Tried and True Strategies:

1. Target outreach and marketing to critical pathways
2. Enlist advisory board and coalition members to serve as ambassadors for the ADRC program
3. Advertise through various media outlets and at multiple locations
4. Develop and use public service announcements (PSAs) strategically
5. Conduct presentations at senior centers, community and health fairs, exhibits at governmental events and functions, conferences
6. Write and distribute related publications such as newsletters, reports, informational briefs
7. Establish a presence on the internet; develop and publicize user-friendly websites
8. Focus on good customer service from the outset, measure satisfaction with services and use information for continuous improvement

33

Module III: ADRC Functions: Awareness
5. *Effectiveness of Marketing Strategies*

How do ADRCs know that their marketing strategies have worked?

-  Documented increased number of contacts over time
-  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

Questions?

Overview of the Aging and Disability Resource Center Program

- ✓ Module I Background and Purpose of the ADRC Initiative
- ✓ Module II Characteristics of ADRC Programs: Single Entry Points and Partnerships
- ✓ Module III ADRC Functions: Awareness
-  **Module IV ADRC Functions: Assistance**
-  Module V ADRC Functions: Access
-  Module VI Other Important ADRC Activities: Evaluation & Sustainability



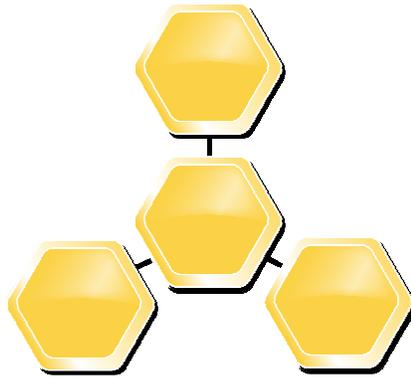
36

Module IV: ADRC Functions: Assistance

Content

1. Types of assistance that ADRCs provide
2. Options counseling (importance, definition, features)
3. Importance of providing decision support
4. Organizational considerations for providing options counseling
5. Planning for future LTC needs
6. The ADRC's consumer focus

37



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

Importance of assisting individuals with decision support—

- Institutional placements often occur without consideration of available community-based options**
- Lots of information regarding LTC options is available from multiple venues but it can be complex, contradictory, and confusing**
- Each person has their own unique set of needs and circumstances; each person needs individualized support to make good decisions about LTC**
- Few people plan ahead for long term support needs**

Session: Overview of the ADRC Program
Module IV: ADRC Functions: Assistance
2. Options Counseling (importance, definition and features)

In providing assistance, ADRCs are expected to do more than provide information. They need to address the specific and unique needs of each individual. This requires:

-  Listening to and assessing consumers' needs
-  Providing information to assist consumers understand their strengths, needs, preferences and unique situations
-  Providing comprehensive service/support options
-  Assisting with decision-making that promotes consumer choice and decision-making
-  Supporting strategies, plans and tactics based on choices, esp. those available in the community

These features of LTC decision-making provide the basis for options counseling -- a pivotal function of ADRCs

40

Session: Overview of the ADRC Program
Module IV: ADRC Functions: Assistance
2. Options Counseling (importance, definition and features)

Definition:

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

41

Options Counseling requires a relationship of trust and a long-term connection

-  It is critical to establish trust if an options counselor will be helping people weigh the pros and cons of various options.
-  It is important to consider that working to provide support may require a longer term connection over a period of time
-  Options counseling is a process more than a single event; it requires skill.

Our job is to give people the tools they need to choose the right path for themselves



Module IV: ADRC Functions: Assistance

4. *Organizational Considerations for Providing Options Counseling*

-  Build a strong foundation in information and referral/assistance (protocols, AIRS certification for accreditation)
-  Decide **who** should provide options counseling
 - Train or hire staff skilled in decision support
 - Ensure staff have access to information about full range of public and private service options
-  Decide who should be offered options counseling
-  Examine process of **where** and **when** options counseling will occur
-  Build in monitoring and feedback systems
 - To document services delivered
 - To gain funding and legislative support
 - Are people making more informed decisions?
 - Are there any trends that may suggest how to modify or improve options counseling?

44

Module IV: ADRC Functions: Assistance

5. *Planning for Future LTC Needs*

-  Determine how to start the conversation
-  Train staff specifically in LTC planning
-  Use existing resources
 - Own Your Future Campaign
 - Home Equity Conversion Mortgage Counseling
 - Materials available at www.adrc-tae.org
-  Build relationships with organizations both public and private that offer assistance in financial planning or strong list of potential places to refer consumers

45

-  People may not know what they want or need. Take time to listen and evaluate pros and cons
-  Let go of the need to do the right thing as you see it
 - It is tempting to “rescue” someone when they are hesitating or having trouble expressing themselves.
 - Few decisions are irreversible and they are always a learning experience.
-  Cultural competence is critical

Questions?

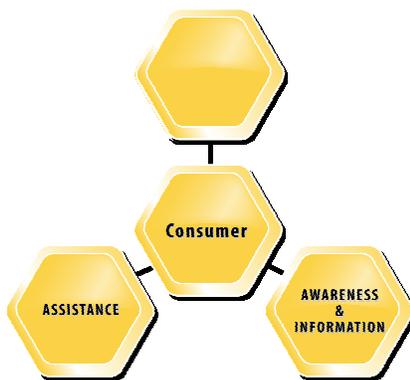
Overview of the Aging and Disability Resource Center Program

- ✓ Module I Background and Purpose of the ADRC Initiative
- ✓ Module II Characteristics of ADRC Programs:
Single Entry Points and Partnerships
- ✓ Module III ADRC Functions: Awareness
- ✓ Module IV ADRC Functions: Assistance
- 🏛️ **Module V ADRC Functions: Access**
- 🏛️ Module VI Other Important ADRC Functions: Evaluation & Sustainability



48

Course: Overview of the ADRC Program Module V: ADRC Functions: Access



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



49

Content Areas

1. Streamlined access – definition and models
2. Process for creating “seamless” access to services for LTC populations
3. Role of Information Technology



1. Streamlined Access – Definition and Models



Module V: ADRC Functions: Access

2. Processes for Creating "Seamless" Access to LTC Services

State Level

-  **Integrated** assessment and eligibility forms for multiple programs and populations
-  **Implemented** "presumptive" or "fast track" eligibility process for at-risk populations
-  **Shortened** or simplify application forms
-  Made applications available **on-line**
-  **Co-located** functional and/or financial eligibility staff with ADRCs
-  Built **statewide web-based I&R databases**
-  **Integrated ADRC and Medicaid** MIS or establish data sharing agreements **across agencies** so ADRCs can track consumers through system

52

Module V: ADRC Functions: Access

2. Processes for Creating "Seamless" Access to LTC Services

Local Level

-  **Provide** training to staff about different public and private service options, programs, eligibility requirements, application process
-  **Collect** some financial information from consumers to determine whether application is appropriate
-  **Assist** consumers complete applications, gather documentation, submit applications
-  **Develop** formal referral protocols (to the ADRC and from the ADRC) with providers and partners to ensure referrals are appropriate
-  **Enhance** telecommunication systems to allow for "warm transfers" with partnering organizations

53

Module V: ADRC Functions: Access

2. Processes for Creating “Seamless” Access to LTC Services

Local Level

-  **Provide** training to staff about different public and private service options, programs, eligibility requirements, application process
-  **Collect** some financial information from consumers to determine whether application is appropriate
-  **Assist** consumers complete applications, gather documentation, submit applications
-  **Develop** formal referral protocols (to the ADRC and from the ADRC) with providers and partners to ensure referrals are appropriate
-  **Enhance** telecommunication systems to allow for “warm transfers” with partnering organizations

54

Module V: ADRC Functions: Access

3. Role of Information Technology

Use Information Technology (IT) to:

-  **Provide online applications**
-  **Streamlined business processes**
 - *Arkansas*
 - *Minnesota*
 - *South Carolina*
-  **Quality of data**
-  **Response to increase demand in services**



55

IT/MIS Focus Areas

-  Information and Referral
-  Client tracking
-  Integrating IT/MIS databases among departments and across agencies
-  Developing public websites



Things to consider, “lessons learned”:

-  Use IT to work smarter not harder
-  Involve end-users in IT development and modification
 - Front line staff – software
 - Consumers -- websites
-  Train staff
-  Develop new or participate in existing software user groups
-  Database maintenance is just as important as creation and must be ongoing
-  Good data will help you to identify service trends, community needs, and gaps in community resources

Questions?

Overview of the Aging and Disability Resource Center Program

- ✓ Module I Background and Purpose of the ADRC Initiative
- ✓ Module II Characteristics of ADRC Programs:
Single Entry Points and Partnerships
- ✓ Module III ADRC Functions: Awareness
- ✓ Module IV ADRC Functions: Assistance
- ✓ Module V ADRC Functions: Access
-  Module VI Other Important ADRC Functions: Evaluation & Sustainability

Evaluation



All ADRCs have Evaluation Plans

- Plans were submitted to AoA and to TAE for review
- Plans form the basis for data collection and reporting activities at ADRCs



ADRCs invest staff and financial resources in evaluation activities

- Some ADRCs sub-contract with external evaluators such as university offices or private firms to conduct evaluations of their programs; some use internal staff
- Data collection and reporting occurs on a regular basis; ADRCs share their evaluation findings with their peers and TAE

Evaluation (con't)

- Both qualitative and quantitative evaluation methods have been used effectively to measure program outcomes and impact
 - Evaluation methods include surveys, interviews, case studies and electronic data collection
- Evaluation data is used internally and externally
 - ADRC staff analyze findings and make adjustments in staff, procedures and protocols to improve organizational effectiveness
 - ADRCs have used information in cultivating partnerships, educating and informing legislators and to enhance the sustainability of their programs

Sustainability

Definition: Ensuring that the program will continue after grant funding has ended; that resources are available to continue project activities

Lessons Learned:

- Embed sustainability in all aspects of program planning
- Develop formal sustainability plans
- Involve community partners in sustainability initiatives
- Use advisory groups or committees to assist with long-term planning
- Identify “program champions” to visibly advocate for the program to funders and policymakers

Sustainability Successes

-  Many ADRCs have obtained 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

Overview of the Aging and Disability Resource Center Program

Recap

-  Background and Purpose of the ADRC Program
 - **History, mission, vision for ADRCs & current status**
-  Characteristics of ADRC Programs
 - **Defined and explained the importance of ADRCs as SEPs and the role of partnerships in effective SEP systems**
-  ADRC Functions: Awareness, Assistance, Access
 - **Social marketing and effective use by ADRCs**
 - **Defined the assistance function with special emphasis on the unique and pivotal role of options counseling in the providing assistance**
 - **How ADRCs have leveraged and used IT/MIS to support access to LTC services and supports**
-  Other Important ADRC Activities: Evaluation & Sustainability
 - **ADRC Evaluation Activities and Uses**
 - **Sustainability “lessons learned” and impact**

64

Overview of the Aging And Disability Resource Center Program

Questions?

Announcements

65

Overview of the ADRC Program
Post-Test and Course Evaluation

Please go to [www._____](#) to take the exam and evaluation.

