Options Counseling ADRC Style: Interactive Workshop
Is Your Organization Ready?

- What surprised you?
- Where are your strengths?
- Where do you need to grow?
- What other items would you add to this readiness assessment?
Learning Objectives

- Explore design and implementation issues related to developing an options counseling program.
- Reflect on your own organizational capacity to implement options counseling.
- Learn about some strategies and approaches other states have used in developing options counseling.
- Hear about tools you can use for training staff to deliver options counseling.
Aging and Disability Resource Centers...

every community in the nation

highly visible and trusted

people of all incomes and ages

information on the full range of long term support options

point of entry for streamlined access to services
Institutional placements often occur without consideration of available community-based options

Lots of information is available on-line and from different I&R providers, but it can be complex, contradictory, and confusing

Families need individualized support making decisions about long-term care

Few people plan ahead for long term support needs
I attended Part I: Art of Options Counseling in person or on-line

- Yes
- No
Foundations of Options Counseling

What is Options Counseling?
Defining 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.

Options Counseling is the “value-added” for ADRCs!
AoA’s National Standard Development

2010/2011

- Group of states, experts, and stakeholder contributing through regular meetings
- Defining the parameters of options counseling (i.e. where it begins and ends and how it intersects with other ADRC functions)
- Establishing core competencies for options counselors
- Developing a comprehensive set of minimum national standards the ADRC Options Counseling and Assistance Program.

Source: AoA 2010 Program Announcement
What is Options Counseling?

**Decision Support**

Information + Education + Personal Experience = Knowledge

- Information Provision
- Decision Support
- Education
What is Options Counseling?

Building Blocks for Decision Support

- Firm foundation in quality information and referral/assistance
  - Many ADRCs requiring AIRS certification for options counselors

- Lessons to be learned from the disability community
  - Person-centered planning
  - Peer counseling

- Tools to assist families in decision making
  - Exploring choices together on paper
  - Action steps outlined for family
  - Motivational interviewing

- Learning through practice and experience
  - Can’t learn “art” from a text book
  - Decision support in difficult situations and complex family dynamics
What is Options Counseling?

How do you know when options counseling is occurring?

- OC takes more time than traditional information and assistance services, e.g., average call times increase.

- OC usually involves in-person meetings and includes family members

- OC includes documenting decision support provided and action steps for consumers, families, and the ADRC

- OC should be guided by standard operating procedures
  - Wisconsin’s Long-Term Care Options Counseling Tool-Kit
  - Indiana’s Standard Operating Procedures

- OC involves tracking consumer outcomes over time
Options Counseling: In the Middle

- Options
- Counseling

I&A

Decision
Support

Facilitation
Pro's/Cons
Prioritization

Case Management
Design Considerations

Today’s Discussion Topics

- Who will be offered options counseling?
- What protocols will be followed?
- What will be involved in actual counseling?
- Who will conduct it? Staff qualifications, training needs, etc.
- How will it be tracked and evaluated?
When Does Options Counseling Occur?

**Situations**
- When an individual is considering a move
- When an individual has immediate or short range long-term care needs
- When a family caregiver needs help to continue providing care
- When a long distance caregiver has concerns about the increased frailty or care needs of a family member
- When an child with a disability is transitioning from a school-based system to the adult service system

**System flow**
- During provision of I&R
- During SHIP counseling
- With hospital discharge
- During an assessment of need
- When applying for publicly funded benefits
- While waiting on application to be processed
- After applying unsuccessfully for public programs
- After admission to a long-term care facility
- As part of transition from institution
Developing Standards for Who Will Receive OC

Poll

Please indicate if your state has some formal legislation, pre-admission screening or other formal way to ensure people have options counseling available to them?

- Yes
- No
- Planning
Developing Standards for Who Will Receive OC

State Example: Massachusetts

- 2006 - Chapter 211, a bill mandating Long-term Care Options Counseling
- Three ADRCs piloting the program
- Specialized staff providing options counseling
- Triggers
  - Partnering with hospitals, short-term rehab centers and nursing facilities to identify individuals appropriate for options counseling
  - Individuals who call ADRC for information and present as needing assistance
Arkansas legislation (Act 516)
Options counseling must be offered to:

- An individual or their representative who seeks counseling
- Newly admitted individuals to NH and AL Level II regardless of payment source
- All individuals seeking Medicaid reimbursement
What is Involved in Options Counseling?

Process/Protocols

Common elements in state options counseling protocols

- Assessing consumer/ family needs
- Connecting consumers with service providers and empowering consumers to make connections
- Helping consumers weigh pros and cons in deciding course of action (decision support)
- Counseling with consumer and support network throughout process

Source: From 2008 survey of Georgia, New Jersey, Wisconsin, Minnesota, and Indiana
What is Involved in Options Counseling?

Six core competencies of options counseling

1. Determining the need for OC
2. Assessing needs, values and preferences
3. Understanding and educating about public and private sector resources
4. Facilitating self-direction / determination
5. Encouraging future orientation
6. Following-up

ACTIVE LISTENING SKILLS
What is Involved in Options Counseling?

Process/Protocols

Our ADRC conducts options counseling in person.

- Yes
- No
- Planning
What is Involved in Options Counseling?

State Example: Wisconsin Reporting Definitions

**Provided Options Counseling** - Options counseling is an interactive decision support process whereby consumers are assisted to evaluate and weigh their long-term care service options (e.g., assistance evaluating housing options, assistance sorting through home care and personal care options, helping a person to decide to move or stay in their current residence)

**Provided Information & Assistance** includes: listening to the inquirer, assessing his or her needs, helping the inquirer to connect with service providers or gain information to meet the identified needs (e.g., provided assistance locating transportation services, chore services, employment and training options, provided linkages to elder abuse and adults at risk system, referred for benefit counseling)

Who Provides Options Counseling?

Various Models Used By States

- Front-line staff – first contact with consumers
  - information and referral/assistance workers

- Specialized staff
  - conducts only OC and possibly assists with other functions

- Specialized staff with minimum qualifications
Who Provides Options Counseling?

State Examples

Wisconsin “LTC Options Counseling”
- I & A staff
- Bachelor of Arts or Science degree or license to practice as a registered nurse
- At least one year of experience working with older adults and/or people with disabilities
- AIRS certification with in one year of employment

New Hampshire “Long-Term Support Counselor”
- Masters preferred, Bachelor’s degree accepted with minimum of three years social work experience, preferably in the areas of aging, disabilities, community health, nursing home or hospital discharge planning.
- Experience working with older adults and or adults with disabilities
Staff Training

Orientation

Topics
- Introduction to the ADRC
- Introduction to the community (public and private resources available)
- Considerations related to specific to populations served (e.g. working with individuals with physical disabilities)
- How to provide decision support (concept, shadowing, coaching)
- Importance of documentation and follow-up (IT systems)

Tools
- WI Training Plan
- WI Orientation Checklist
- WI Supervisor Guide (in development)

Examples
- WI Resource Centered Document
- Orientation Chart ADRC of Brown County
Sample: Information and Assistance Specialist Training Needs Plan

This sample training plan is designed to provide a format for documenting training needs of individual I&A Specialists.
ADRC of ___________________________________________________________
Name of I&A Specialist ______________________________________________

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<th>Date</th>
<th>Knowledge or skill area and level (beginner, etc.)</th>
<th>How learning will take place (OC toolkit, mentoring, etc.)</th>
<th>Comments</th>
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On-going Training

- Continuous identification of training needs
- Local/state resources
- National resources
  - Alliance for Information and Referral Systems
  - Technical Assistance Exchange
  - Universities
  - Decision support tools (person-centered planning, motivational interviewing)
- Weekly staff meetings
  - Communication
  - Scenarios
  - Discuss community resources
  - Review policies and procedures
  - Fosters a team approach and atmosphere
How do you plan on evaluating options counseling?

- Consumer satisfaction surveys
- Tracking outcome of consumer decisions made
- Measuring cost savings
- All of the above
- None of the above
Tracking and Evaluation

Suggested Measures

**System Level**
- Follow-up on the outcomes of individuals who received options counseling
  - Impact on the use of home and community based services vs. institutional services

**Staff level**
- Call listening
- Secret Shopping
- Documentation review
- Peer Review

**Consumer Level**
- Consumer Satisfaction
- Assistance in making a decision
  - “The information and assistance I received from ADRC staff helped me make a decision.”
  - “Options counseling helped me think through my options.”

**Suggested Measures**
- System Level
- Consumer Level
- Staff Level
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