

24th National Home and Community Based Services Conference

NATIONAL ASSOCIATION OF STATE UNITS ON AGING
MASSACHUSETTS EXECUTIVE OFFICE OF ELDER AFFAIRS

Conference Program
Exhibitor Guide



SEPTEMBER 28 – OCTOBER 1, 2008

WESTIN BOSTON WATERFRONT HOTEL

BOSTON, MASSACHUSETTS



24th National Home and Community Based Services Conference

NATIONAL ASSOCIATION OF STATE UNITS ON AGING
MASSACHUSETTS EXECUTIVE OFFICE OF ELDER AFFAIRS

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SEPTEMBER 28 – OCTOBER 1, 2008

WESTIN BOSTON WATERFRONT HOTEL

BOSTON, MASSACHUSETTS





Dear Colleagues:

On behalf of the National Association of State Units on Aging, Massachusetts Executive Office of Elder Affairs and an outstanding planning committee, welcome to Boston and the **24th National Home and Community Based Services Conference**. This city is inspiration for our conference theme, "The Spirit of Independence, which so aptly depicts our vision and intent. As you participate in the conference, we hope you will embrace what independence truly means in the lives of consumers of all ages and abilities in every community across the nation who seek home and community based services.

We are excited to have a terrific line-up of speakers at this year's conference. You will hear about new Congressional home and community based initiatives, learn from top leaders within the U.S. Department of Health and Human Services, and experience firsthand the innovations occurring in Massachusetts and the entire New England region.

This year's conference includes five plenary sessions, four intensives, and 80 workshops. We also have more than 20 poster sessions and an outstanding mobile learning lab site visit. Choose your experience. Network with the nation's leading experts in the field. Share your best practices.

This year's conference will cover a broad spectrum to bring you the latest in trends and policies, state and local systems design, and research that is leading the way toward a successful future for home and community based services. Quality and consumer direction are guiding principles that have helped us shape this dynamic agenda.

We would like to thank this year's presenters and planners who have laid the foundation for this event. Our appreciation is also extended to this year's sponsors. We encourage you to visit the vendor exhibit area where our sponsors and vendors are displaying and discussing the latest products, services, and solutions for Home and Community Based Supports and Services. We hope that you enjoy the conference.

Sincerely,

Patricia A. Polansky,
*President, National
Association of State Units
on Aging Board of Directors*

Michael E. Festa,
*Secretary, Massachusetts
Office of Elder Affairs*

Martha A. Roherty,
*Executive Director,
National Association of
State Units on Aging*

National Conference Planning Committee

24TH NATIONAL HOME AND COMMUNITY BASED SERVICES CONFERENCE

National Association of State Units on Aging

Martha A. Roherty, Executive Director
Jessica Barker
Kimberly Fletcher
A. Bernice Hutchinson
Melanie McNeil
Eric Risteen
Cathy Rudd
Norah Yahya

Massachusetts Executive Office of Elder Affairs

Michael E. Festa, Secretary
Carole Malone
Elana Margolis
Ruth Palombo
Annette Peele
Barbara Roberts
Sue Thomson



Lee Bezanson

Community Living Exchange
Collaborative at Independent Living
Research Utilization

Suzanne Bosstick

Centers for Medicare & Medicaid Services

Joy Cameron

National Governors Association

Greg Case

U.S. Administration on Aging

Robin Cooper

National Association of State
Directors of Developmental Disabilities
Services, Inc.

Ilana Cohen

American Public Health Services Association

Pam Doty

Office of the Assistant Secretary for Planning
and Evaluation, U.S. Department of Health and
Human Services

Eileen Elias

Office on Disability, U.S. Department of
Health and Human Services

Donna Folkemer

National Conference of State
Legislatures

Wendy Fox-Grage

AARP Public Policy Institute

Bob Glover

National Association of State
Mental Health Program
Directors

Greg Link

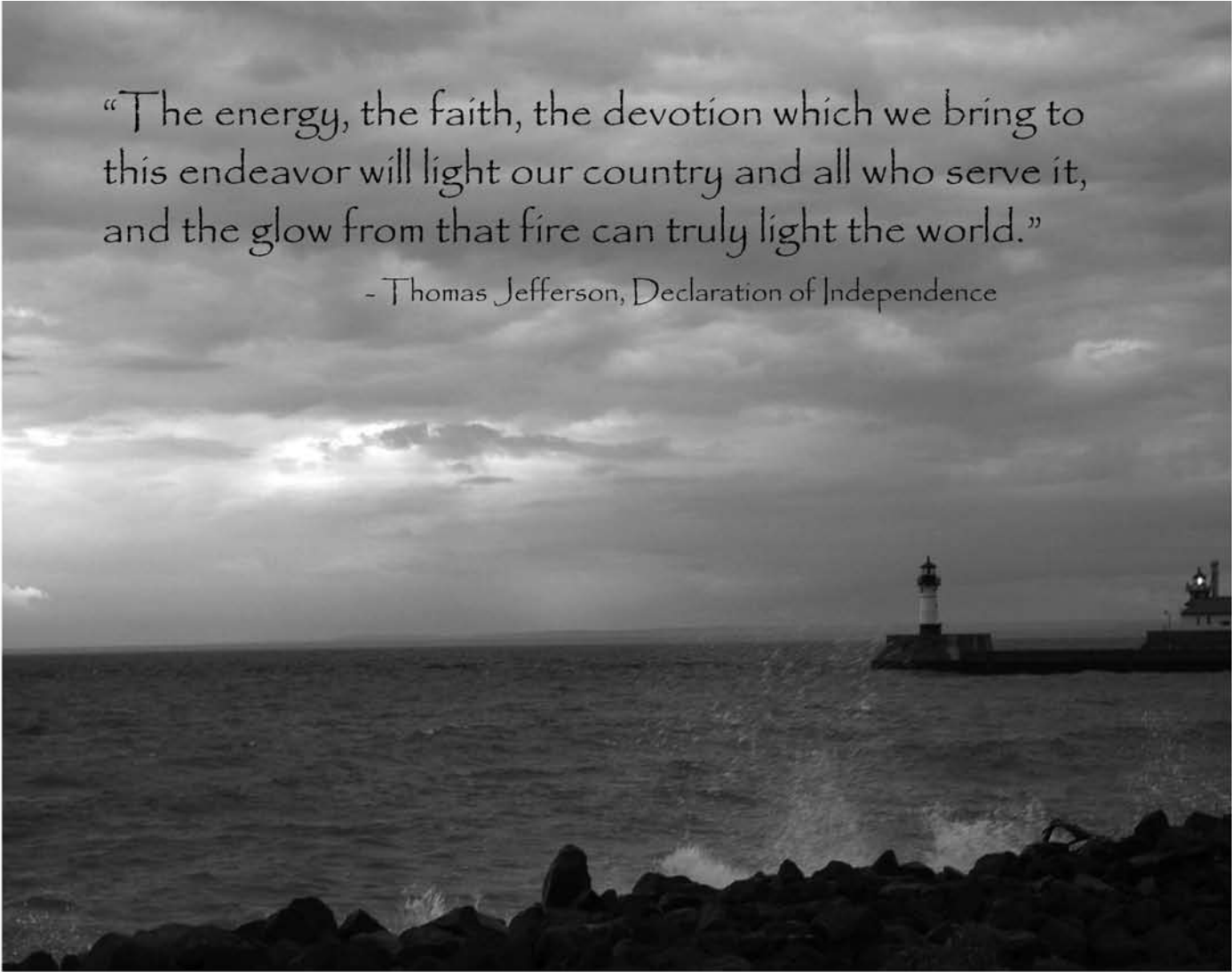
U.S. Administration on Aging

Darlene O'Connor

University of Massachusetts
Medical School

Richard Petty

Independent Living
Research Utilization



"The energy, the faith, the devotion which we bring to this endeavor will light our country and all who serve it, and the glow from that fire can truly light the world."

- Thomas Jefferson, Declaration of Independence

Mains'l Services, Inc. is an experienced Fiscal Agent, offering a range of Self-Directed Supports to people who need assistance due to aging and disabilities.

We partner with states, local agencies, consumers, and those closest to them, to offer people a range of control, authority, and flexibility over their supports.

The horizon is endless - together let's discover the possibilities.

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Special Thanks to Our 2008 Sponsors

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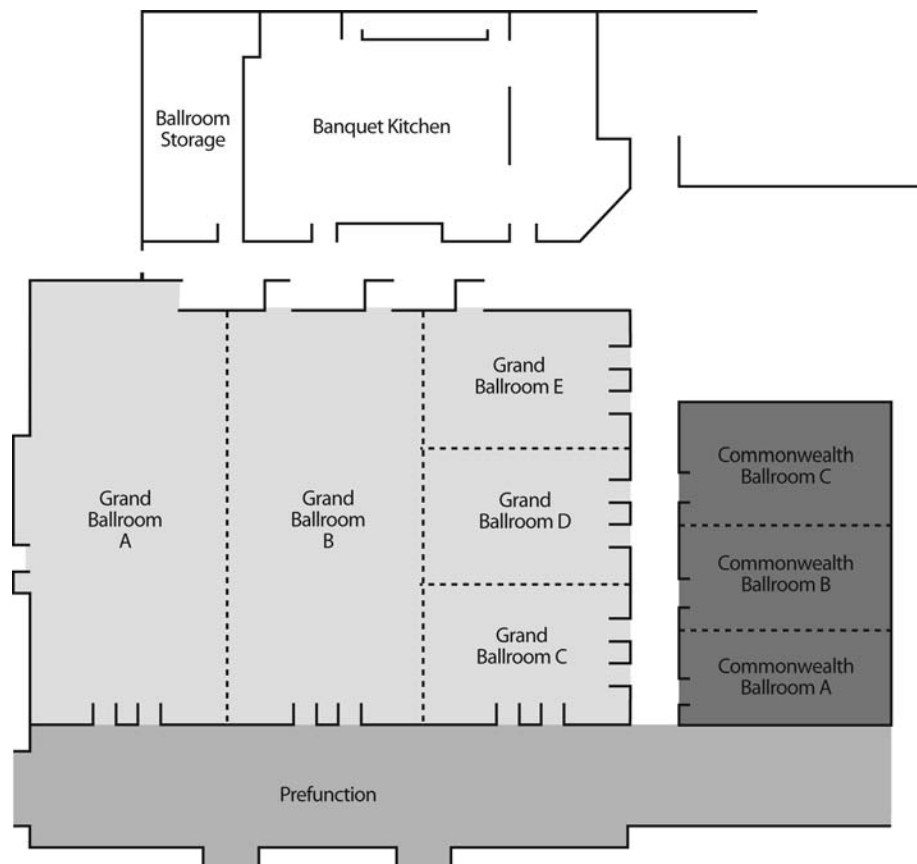
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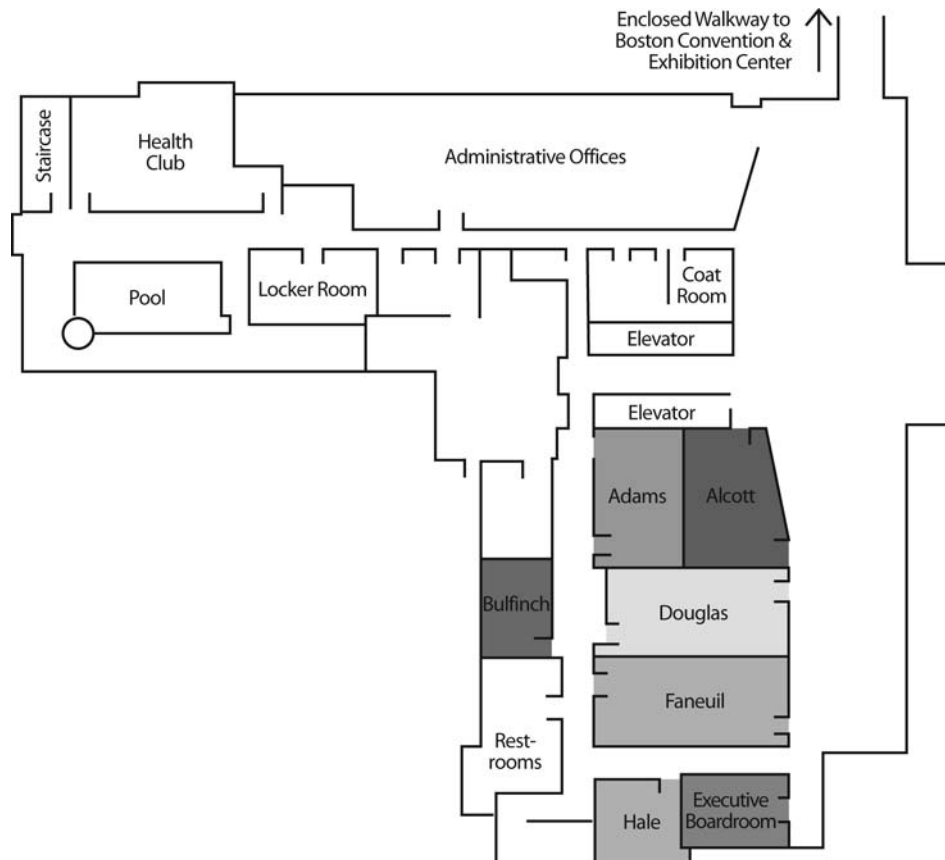
The Lewin Group, Inc.

Westin Boston Waterfront Hotel Floor Plans

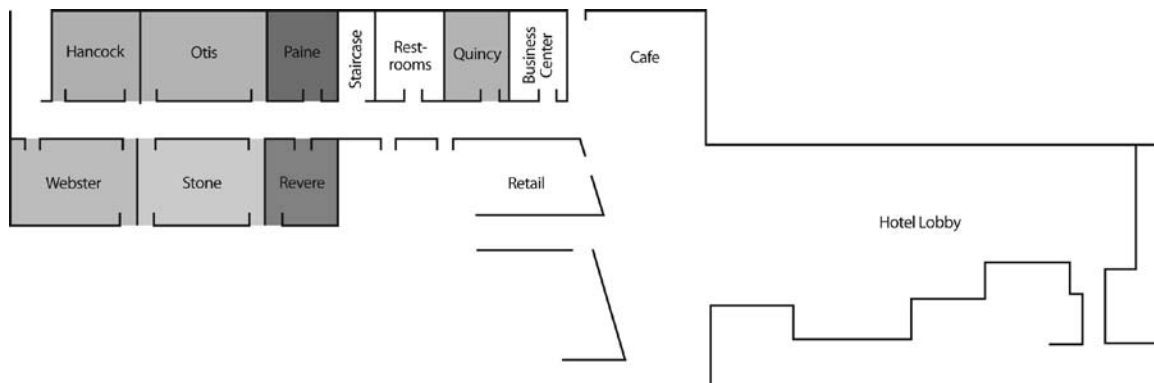
Concourse Level



Mezzanine Level



Lobby Level



Agenda at a Glance

SATURDAY, SEPTEMBER 27, 2008

8:30 a.m. – 6:00 p.m.	State Unit on Aging Membership Meeting— Commonwealth Ballroom B-C Convened by the National Association of State Units on Aging <i>(NASUA Member Event by Invitation with Separate Registration)</i>
12:00 noon – 5:00 p.m.	Home and Community Based Services Conference Registration—Commonwealth Foyer
7:00 p.m. – 9:00 p.m.	State Unit on Aging Directors Reception and Dinner Convened by the National Association of State Units on Aging <i>(NASUA Member Event by Invitation with Separate Registration)</i>

SUNDAY, SEPTEMBER 28, 2008

8:00 a.m. – 7:00 p.m.	Home and Community Based Services Conference Registration—Commonwealth Foyer
10:00 a.m. – 11:30 a.m.	State Unit On Aging Membership Meeting—Otis <i>(NASUA Member Event by Invitation with Separate Registration)</i>
12:00 noon – 1:30 p.m.	Opening Plenary—Harbor Ballroom Innovations in Massachusetts Home and Community Based Services Patricia A. Polansky , President, National Association of State Units on Aging Martha A. Roherty , Executive Director, National Association of State Units on Aging Michael E. Festa , Secretary, Massachusetts Executive Office of Elder Affairs Dr. JudyAnn Bigby , Secretary, Massachusetts Executive Office of Health and Human Services Paul Lanzikos , Executive Director, North Shore Elder Services

SUNDAY, SEPTEMBER 28, 2008 CONTINUED

1:45 p.m. – 3:15 p.m.

Workshops

- Creativity in Waiver Design: How Managed Care and Home and Community Based Services Work Together to Create a New Model of Community Care—Commonwealth A-B
- One Vision, One Call: Coordinating Human Services Transportation Systems Using Technology—Commonwealth C
- Successfully Finding, Choosing and Keeping Your Personal Assistants—Grand Ballroom D
- Improving Medication Access and Use—Grand Ballroom E
- Mapping Your Future—Grand Ballroom C
- From Prosecution to Prevention: A Public Partnership Model of Elder Protective Services—Adams

3:30 p.m. – 5:00 p.m.

Workshops

- *CMS Workshop Series: Medicaid Basics: What Every Program Administrator Needs to Know About Medicaid and the General Medicaid Rules that Apply to Home and Community Based Services*—Commonwealth A-B
- Preparing Aging Services for the Lesbian, Gay, Bisexual and Transgender “Age Wave”—Commonwealth C
- Of, By and For the People: Consumers Evaluating Home and Community Based Services Programs—Grand Ballroom C
- Quality Care Connections: A Collaborative Partnership Model That Works—Grand Ballroom D
- Transforming Quality for Long Term Care: States on Systems Transformation Grant Quality Initiatives—Grand Ballroom E

5:30 p.m. – 7:00 p.m.

Opening Reception—Harbor Ballroom

6:30 p.m. – 9:00 p.m.

NASUA Board of Directors Dinner—Executive Board Room

(NASUA Board of Directors Event by Invitation)



MONDAY, SEPTEMBER 29, 2008

7:00 a.m. – 5:00 p.m.	Home and Community Based Services Conference Registration—Commonwealth Foyer
7:30 a.m. – 8:00 a.m.	Continental Breakfast—Grand Ballroom Foyer
8:00 a.m. – 9:30 a.m.	<p>Plenary—Grand Ballroom A-B Advancing Technology for Older Adults and Persons with Disabilities</p> <p>Joseph F. Coughlin, Director, AgeLab, Massachusetts Institute of Technology</p> <p>A Foundation for Progress: A Retrospective of Federal Initiatives in Home and Community Based Services</p> <p>Josefina G. Carbonell, Assistant Secretary for Aging, U.S. Administration on Aging, U.S. Department of Health and Human Services</p> <p>Dr. Tevi D.Troy, Deputy Secretary, U.S Department of Health and Human Services</p>
9:45 a.m. – 11:15 a.m.	<p>Workshops</p> <ul style="list-style-type: none"> • Aging and Disability Resource Centers: A Keystone to Broader Long Term Care Balancing Efforts—Alcott • Developmental Disabilities Waiver Managers' Open Forum—Commonwealth A-B • Consumer Direction and the Aging Network: An Update and Introduction of a New Technical Assistance Resource—Commonwealth C • Increasing Opportunities for Elders Self Direction—Grand Ballroom C • Home and Community Based Services: Partnering with Primary Care Providers in Low Income and Underserved Communities—Grand Ballroom D • Preventing Falls and Promoting Health Through Community Collaboration: The Evidence is In—Grand Ballroom E • How to Work with Nursing Facilities to Downsize and Reconfigure their Assets to Meet Changing Market Realities and Reinvest the Medicaid Savings—Hancock • Managing Risk While Supporting Consumer Decision Making in Options Counseling—Otis • Adult Foster Care for Older Adults: Policy Trends and Models—Stone • Where Isn't PACE in Pennsylvania?—Webster

MONDAY, SEPTEMBER 29, 2008 CONTINUED**11:30 a.m. – 1:30 p.m.****Plenary Luncheon—Grand Ballroom**
Strengthening the Medicaid Home and Community Based Services Option

Senator John Kerry, Massachusetts

A Town Hall Meeting: Balancing Long Term Services and Supports

Susan Reinhard, Senior Vice President, AARP Public Policy Institute

Dennis Streets, Director, North Carolina Division of Aging and Adult Services

Ann Kohler, Director of the National Association of State Medicaid Directors

Kathy Greenlee, Secretary of the Kansas Department of Aging

1:30 p.m. – 2:15 p.m.**Exhibit Hall Opening with Dessert****1:30 p.m. – 4:30 p.m.****Intensive***Pre-registration with Fee*

- Direct Service Workforce: Needs, Challenges and Intervention Strategies—Adams

2:30 p.m. – 4:00 p.m.**Workshops**

- Primary Care House Calls: Serving the Frail Elderly in the Medical Home Model—Alcott
- Livable Communities: What Does it Mean and How Do We Start the Process?—Grand Ballroom E
- Trends in Lifespan Communities: NORCs and Village Movement—Commonwealth A-B
- CMS Workshop Series: Managed Long Term Care, Part 1: Present and Future Legal Authorities—Commonwealth C
- Voices of Experience: Tools for Overcoming Resistance to Consumer Direction—Grand Ballroom C
- Preparing for the Elder Wave: Projecting Long Term Care Needs and Resources—Grand Ballroom D
- Changing Times, Changing Attitudes: Maine's Effort to Shrink the Role of Guardianship in an Era of Self Direction—Hancock
- HIV Positive and Over 50: We Are All At Risk—Otis
- The Freedom Trail: Independence through Community Housing Alternatives—Stone
- A Methodology for Projecting a State's Long Term Care Costs—Webster

4:30 p.m. – 6:00 p.m.**Reception—Galleria Hall**

TUESDAY, SEPTEMBER 30, 2008

7:00 a.m. – 5:30 p.m.	Home and Community Based Services Conference Registration—Commonwealth Foyer
7:30 a.m. – 8:30 a.m.	Continental Breakfast—Grand Ballroom Foyer
8:30 a.m. – 10:00 a.m.	<p>Plenary—Grand Ballroom A-B Changing Administrations: Implications for Serving Diverse Populations</p> <p>A. Bernice Hutchinson, Senior Policy Advisor, National Association of State Units on Aging Nancy Thaler, Executive Director, National Association of State Directors of Developmental Disabilities Services (NASDDDS) Ann Kohler, Director, National Association of State Medicaid Directors (NASMD) Daniel Schoeps, Director, Long Term Care Purchasing, U.S. Veterans Health Administration Charles D. Johnson, Director, Illinois Department on Aging</p>
10:15 a.m. – 11:45 a.m.	<p>Workshops</p> <ul style="list-style-type: none"> • The State Employment Leadership Network (SELN): Partnerships Among State Systems to Improve Employment Outcomes—Alcott • <i>CMS Workshop Series</i>: Home and Community Based Services: Waiver Basics, State Plan Option, Quality and State Experience—Commonwealth A-B • Nursing Home Diversion Modernization Initiative: Modernizing the Aging Network's Role in Long Term Care—Commonwealth C • More than Words: Fostering Understanding and Collaboration Between Culturally and Functionally Different Communities—Grand Ballroom C • Maryland's Experience Building Systems to Facilitate Community Integration and Empower Program Participants—Grand Ballroom D • From Program Focused to Person Centered: Changing the Culture of a Human Services Agency—Grand Ballroom E • Making Emergency Preparedness Accessible to All—Hancock • Restructuring Quality Management: Lessons Learned from Pennsylvania—Otis • Targeted Case Management in Home and Community Based Services Programs—Webster • The Role of the Long Term Care Ombudsman in a Modernizing Long Term Care System—Stone

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:00 noon – 12:45 p.m.

Lunch—Grand Ballroom A-B

12:45 noon – 2:15 p.m.

Poster Sessions and Exhibits with Dessert

- Live and Learn: An Innovative Early Stage Program
- Enacting Support Brokerage in the Twelve Cash and Counseling Expansion States
- What Impact Does Ability to Purchase Goods and Services Have on Participants in Cash and Counseling Programs?
- West Virginia's Self Directed Supports and Services Program
- Consumer Direction and Home Care: Paid Family Caregiving from a Consumer Perspective
- Living with Low Vision or Hope When Hope Fails
- The Public Authority: A Tool for Implementing Consumer Directed Care
- Preliminary Findings from Guam's Person Centered Planning Project
- Participation in Senior Center Activities: A Prospectus on Targeting Patrons by SES and Related Factors
- Reducing Loneliness in Community Long Term Care
- SeniorPalooza: The Ideal Opportunity for Promoting Aging in Place and Elder Care Services
- Elder Mediation: A Valuable Resource for Resolving Disputes Involving Elders and their Families
- Caregiving and Employment: Can You Do Both
- Employment Supportive Personal Assistant Services in Medicaid Programs
- Gaining an Understanding About Residents Residing in Independent Living Facilities
- The Road Not Taken: Medicaid Assisted Living in Public Housing
- The Impact of State Attributes on Personal Assistance Service Use
- HCBS.org: The Clearinghouse for Home and Community Based Services
- Promoting Economic Security: A Framework for Increasing Access to Home and Community Based Long Term Care Services
- Reorganization on Services and Systems
- Savings from Rebalancing: Reality or Myth
- Tailoring Sensor Technology to Memory Impaired Residents in Independent Living Facilities
- No Wrong Door for Finding Community Supports
- Using Websites for Consumer Directed Services: The Georgia TPA Web Portal
- Medicaid Long Term Care Home and Community Based Services: Trends in Programs and Policies, 1999–2005
- JEVS Support for Independence-Consumer Directed Training Series



TUESDAY, SEPTEMBER 30, 2008 CONTINUED

<p>1:00 p.m. – 5:00 p.m.</p>	<p>Nursing Home Diversion Grantee Meeting—Douglas Room Convened by the U.S. Administration on Aging <i>(AoA Grantee Event by Invitation)</i></p>
<p>1:30 p.m. – 5:30 p.m.</p>	<p>Mobile Learning Laboratory— Main Hotel Lobby <i>Site visit with fee. Pre-registration and limited space availability.</i></p> <ul style="list-style-type: none"> • Two Sites, One Visit: AgeLab, Massachusetts Institute of Technology and Adaptive Environment, Institute for Human Centered Design
<p>2:00 p.m. – 5:00 p.m.</p>	<p>Intensives <i>Pre-registration with Fee</i></p> <ul style="list-style-type: none"> • Becoming a Person Centered System—Adams • Developing a Quality and Performance Measurement Strategy for HCBS Programs—Faneuil
<p>2:15 p.m. – 3:45 p.m.</p>	<p>Workshops</p> <ul style="list-style-type: none"> • Transportation: An Essential Support for Community Living—Alcott • <i>CMS Workshop Series</i>—Managed Long Term Care, Part 2: Challenges to Operationalizing a Managed Long Term Care Program—Commonwealth A-B • The Elder Justice Act and its Relationship to Home and Community Based Services—Commonwealth C • Consumer Needs Assessment: Tools to Assist in Self Assessment and Quality Provider Selection—Grand Ballroom E • Connection Technology Getting Everyone Connected is Key to Successful Direction Waiver Programs—Hancock • Bridging the Gap for Older Adults: State and National Initiatives for Care Coordination—Otis • When a Case Manager Wears More than One Hat: Practical Tools for Identifying and Addressing a Conflict of Interest—Stone • State Funded Home and Community Based Services Programs for Older People: Findings and Trends—Webster • Project 2020: Can Home and Community Based Services Be Expanded Without Busting the Budget?—Grand Ballroom C • Children’s Program for All Inclusive Care (CHIPACC): Using Medicaid Authorities to Serve Children with Life Threatening Illnesses—Grand Ballroom D

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

4:00 p.m. – 5:30 p.m.

Workshops

- Public Private Partnerships Can Serve as Models to Help Seniors Live Independently—Alcott
- *CMS Workshop Series*: CMS Open Microphone Session—Commonwealth A-B
- New Directions: State by State Results from Annual Aging Network Assessment—Commonwealth C
- Cash and Counseling: Moving Beyond the Demonstration and Replication—Grand Ballroom C
- Community Transportation and Medical Transportation: Lifelines for Aging in Place—Grand Ballroom D
- Assuring Quality in the Money Follows the Person Program: Notable Practices and Lessons Learned from State Experiences—Grand Ballroom E
- Launching Children's Waiver Programs: Two States Approaches to Serving Children with Autism and Other Disabilities—Otis
- Collaborating to Create Workforce Solutions—Stone
- Development of Evidence Based and Recovery Oriented Service Initiatives by the Real Choice Mental Health Systems Transformation Grantees—Webster



WEDNESDAY, OCTOBER 1, 2008

<p>7:00 a.m. – 9:30 a.m.</p>	<p>Home and Community Based Services Conference Registration—Commonwealth Foyer</p>
<p>8:30 a.m. – 10:00 a.m.</p>	<p>Workshops</p> <ul style="list-style-type: none"> • Implementing and Refining Individual Resource Allocation Methodologies—Alcott • Money Follows the Person Demonstration Initiatives: Early Implementation Experiences—Commonwealth A-B • State Data Based Quality Management Strategies—Commonwealth C • Improving Home and Community Based Services Waiver Resource Allocation: Cross State Examination of Efforts to Develop Reimbursement Levels and Individual Budgets Using the Supports Intensity Scale—Grand Ballroom C • Interventions for People with Autism Spectrum Disorders—Grand Ballroom E • Advancing Understanding of the Aging Network’s Role in States Home and Community Based Services Systems—Hancock • Collecting and Using Data for Home and Community Based Services Quality Improvement—Otis • Preventing Disability: The Texas Demonstration to Maintain Independence and Employment—Stone • Success In Indiana: The Results of Effective Public and Private Collaboration—Webster • Transforming Home and Community Based Services: The Massachusetts and New Jersey Models—Grand Ballroom D
<p>10:15 a.m. – 11:45 a.m.</p>	<p>Workshops</p> <ul style="list-style-type: none"> • Transition of Many to One: The Implementation of the Statewide Vendor Fiscal Intermediary Service Organization in Pennsylvania—Alcott • <i>CMS Workshop Series: CMS Innovations and Policy Advancements: 27 Year Evolution in Home and Community Based Services</i>—Commonwealth A-B • Navigating the Quality Improvement Ship in Blue Waters—Grand Ballroom C • New York State’s Long Term Care Councils: A Vehicle for Community Change—Grand Ballroom D • Coordinating Community Long Term Care Services for Medically Complex Children: A MassHealth Model—Grand Ballroom E

WEDNESDAY, OCTOBER 1, 2008 CONTINUED

<p>10:15 – 11:45 a.m. <i>(Continued)</i></p>	<ul style="list-style-type: none"> • Community Service Grants: Venture Capital for Transforming Minnesota's Long Term Care System—Hancock • Addressing Direct Service Workforce Challenges in Partnership—Otis • From Quality Management to Quality Improvement: Use of Evidence Based Programs in HCBS Waivers—Stone • Administration on Aging Nursing Home Diversion Modernization and Veterans Directed Home and Community Based Service Grants—Webster • Issues in the Development of Home and Community Based Services Programs for Persons with Mental Illness—Commonwealth C
<p>12:00 noon – 2:00 p.m.</p>	<p>Closing Plenary Luncheon—Grand Ballroom</p> <p>Highlight of Federal Initiatives in Home and Community Based Services and Implications for the Future Josefina G. Carbonell, Assistant Secretary for Aging, U.S. Administration on Aging Herb B. Kuhn, Deputy Administrator, Centers for Medicare & Medicaid Services</p> <p>Project 2020: Fulfilling the Promise of Home and Community Based Services and Supports Patricia Polansky, President, National Association of State Units on Aging Board of Directors Charlie Sisson, Immediate Past President, n4a Board of Directors Sandy Markwood, CEO, n4a Martha A. Roherty, Executive Director, National Association of State Units on Aging</p>
<p>2:00 p.m.</p>	<p>National Aging and Disability Resource Center Conference Begins—Grand Ballroom C-E Convened by the U.S. Administration on Aging <i>(AoA Sponsored Event, Separate Registration)</i></p>



It takes a community to provide quality care!!

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Dr. Molina believed every patient should be treated like family, and at Molina Healthcare we give lower income families and individuals access to hundreds of physicians and specialists.

Following Dr. Molina's vision, our Care Coordination Model focuses on the needs of each member to deliver preventive, physical health, behavioral health and psycho-social services that are culturally appropriate; while delivering and sustaining positive clinical, economic, and member defined outcomes that help the member attain a lifestyle of independence with minimal restrictions. Our philosophy is that to successfully engage and assist these populations, they must be enrolled into a fully integrated program dedicated to their unique needs.

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SATURDAY, SEPTEMBER 27, 2008

8:30 a.m. – 6:00 p.m.	State Unit on Aging Membership Meeting—Commonwealth Ballroom B-C Convened by the National Association of State Units on Aging <i>(NASUA Member Event by Invitation with Separate Registration)</i>
12:00 noon – 5:00 p.m.	Home and Community Based Services Conference Registration—Commonwealth Foyer
7:00 pm – 9:00 pm	NASUA Board of Directors Dinner—Executive Board Room Convened by the National Association of State Units on Aging <i>(NASUA Member Event by Invitation with Separate Registration)</i>

SUNDAY, SEPTEMBER 28, 2008

8:00 a.m. – 7:00 p.m.	Home and Community Based Services Conference Registration—Commonwealth Foyer
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SUNDAY, SEPTEMBER 28, 2008 CONTINUED

1:45 p.m. – 3:15 p.m.

Workshops

From Prevention to Prosecution: A Public Partnership Model of Elder Protective Services—Adams

The Massachusetts Executive Office of Elder Affairs has been in the forefront of innovative training and prevention programs based on collaborative partnerships with other state agencies, creating a safety net to maximize resources, expertise and protections for vulnerable elders. Partnering with law enforcement and regulatory agencies, protocols are developed to ensure proper authorities are aware of potential abuse or exploitation and that investigations are conducted cooperatively where appropriate. Resources are focused on protecting elders through prevention, detection and prosecution. This intensive will feature key leaders in Massachusetts from the Attorney General to the Bankers Association who will describe their successful interagency cooperation. The session will also showcase detection and prevention of financial exploitation by taking attendees through a Bank Reporting Project training as well as discussing specific case studies in exploitation prevention. Finally, the session will present in detail the Money Management Program model and give participants an opportunity to discuss successes and challenges and opportunities for expansion of services.

PRESENTERS:

Michael E. Festa, Secretary, Massachusetts Executive Office of Elder Affairs

Elana Margolis, Chief Legal Counsel, Massachusetts Executive Office of Elder Affairs

Representatives from Massachusetts Attorney General's Office and the District Attorney, Massachusetts

Creativity in Waiver Design: How Managed Care and Home and Community Based Services Work Together to Create a New Model of Community Care

Commonwealth A-B

Track: Systems Change

New managed care approaches that consolidate funding and position government entities as managers overseeing private-sector providers offer potential to improve delivery of services and increase consumer control even in the face of limited resources. The Piedmont Cardinal Health Plan and Innovations sub-state waivers—operated by a regional public agency under contract to the state of



SUNDAY, SEPTEMBER 28, 2008 CONTINUED

1:45 p.m. – 3:15 p.m.
(Continued)

North Carolina since April 2005—offer a unique national model that optimizes the structures of both 1915(b) and 1915(c) waivers to achieve these goals and benefit people across three disabilities: mental health, developmental disabilities, and substance abuse services. This presentation will describe the design and results of this 1915(b)/(c) concurrent waiver, including its self direction element and the benefits of having money follow the person from ICF-MR to community services.

PRESENTERS:

Pamela Shipman, Deputy Area Director, Piedmont Behavioral Health

Andrea Misenheimer, Medicaid Project Manager, Piedmont Behavioral Health

Judy Walton, Program Administrator, NC Division of Medical Assistance

One Vision, One Call: Coordinating Human Services Transportation Systems Using Technology

Commonwealth C

Track: Supports for Community Living

A continuum of seamlessly accessible transportation services is an integral component of home and community based services, in that it allows individuals of all ages to remain active, independent, and involved in the community. This workshop will demonstrate how cooperation, collaboration, and integration combined with technology is resulting in better and more effective transportation services for consumers through the U.S. Department of Transportation's United We Ride/Mobility Services for All Americans.

The presenters and Mobility Services for All Americans grantees will describe:

- an overview of United We Ride and Mobility Services for All Americans goals and its “One Vision, One Call” approach
- how coordination leads to better systems design
- how technology can enable the various components of transportation services to work together more effectively
- efforts to build more seamless transportation systems using technology for consumers in their service areas.

SUNDAY, SEPTEMBER 28, 2008 CONTINUED

1:45 p.m. – 3:15 p.m.

(Continued)

PRESENTERS:

Greg Link, Aging Services Program Specialist, U.S. Administration on Aging

Yehuda Gross, ITS Program Manager, U.S. Department of Transportation

Nancy Snow, Mobility Manager, Transit Authority of River City, Louisville, KY

Successfully Finding, Choosing and Keeping Your Personal Assistants

Grand Ballroom D

Track: Consumer Direction/Self-Determination

As more and more elders, people with disabilities, and families benefit from consumer directed Personal Assistance Services under State Plans or waivers, the need for well planned programs to attract qualified direct support workers is becoming more acute. This session will describe how Rewarding Work Resources (RWR), a non-profit organization, is attracting qualified workers and allowing self directed consumers to hire and support their needs quickly and easily.

Specifically, the presentation will detail:

- RWR's successful use of a comprehensive outreach program, an effective infrastructure to capture prospects, and a user friendly consumer website to achieve its objectives and
- how Rhode Island, Vermont, Massachusetts, and Connecticut have adapted RWR's services to meet their special needs.

PRESENTERS:

Elenore Parker, President, Rewarding Work Resources, Inc.

Jeffrey Keilson, Vice President, Rewarding Work Resources, Inc.

Paul Choquette, Senior Health Care Delivery Systems Specialist, RI Department of Human Services

Improving Medication Access and Use

Grand Ballroom E

Track: Supports for Community Living

Frail elders receiving home and community based services have been found to have a substantially higher rate of inappropriate medication use than nursing facility residents. Community based care management programs, which represent a significant investment of public

SUNDAY, SEPTEMBER 28, 2008 CONTINUED

1:45 p.m. – 3:15 p.m.
(Continued)

funds, must improve their performance in this area that is so critical to sustaining and restoring the health and quality of life for low-income elders.

This workshop will highlight two cutting-edge state-based programs aimed at achieving this goal:

- MassMedLine, a public-private partnership between the Massachusetts Executive Office of Elder Affairs and the Massachusetts College of Pharmacy and Health Sciences that employs a statewide toll-free helpline to assist Massachusetts residents, especially the aging and underserved, access medications and get answers to their medication related questions.
- The Medication Management Improvement System (MMIS), a systematic, comprehensive, and replicable medical management system assisting care managers in California to increase client safety and improve quality of care with the help of computerized risk assessment tools and medication experts.

PRESENTERS:

Iya Kahramanian, Project Manager, Partners in Care Foundation

Sandy Atkins, Associate Director, Partners in Care Foundation

Mary Sullivan, Director, MassMedLine, Massachusetts College of Pharmacy and Health Sciences

Colleen Massey, Program Director, MassMedLine

Mapping Your Future

Grand Ballroom C

Track: Systems Change

This workshop will feature a hands-on approach to the process of creating maps using geographic information systems (GIS) technology. Presenting information visually is a powerful planning and policymaking tool that can be used by the aging network to display population and service data on a map. This workshop is a primer for those new to GIS and ArcGIS, infrequent users of ArcGIS, and anyone without a GIS background. The workshop will provide the foundation for understanding what GIS is, what it can do, and how others are using these systems.

SUNDAY, SEPTEMBER 28, 2008 CONTINUED

1:45 p.m. – 3:15 p.m.
(Continued)

At the conclusion of the workshop, participants will be able to:

- Utilize maps available on the Florida Department of Elder Affairs website
- Manipulate these maps to fit their needs, and
- Utilize geographic information systems to clarify issues and help the aging network make policy decisions.

PRESENTERS:

Sylvia J. Cohen, Planner, Florida Department of Elder Affairs
Laurie Koburger, Senior Management Analyst Supervisor,
Florida Department of Elder Affairs

3:30 p.m. – 5:00 p.m.

Workshops

Medicaid Basics: What Every Program Administrator Needs to Know About Medicaid and the General Medicaid Rules that Apply to Home and Community Based Services

Commonwealth A-B

Track: CMS Workshop Series

Home and Community Based Services (HCBS) will be an increasingly critical factor in governmental efforts to extend care to a dramatically growing elder and disabled population without busting the budget. Yet HCBS programs are governed by a challenging and ever changing tangle of federal and state statutes and regulations. This session is a must for attendees who need to acquaint themselves with the ins-and-outs of laws and regulations involving HCBS at the federal level.

Specifically, presenters will offer:

- an introduction to the overarching provisions of the Medicaid statute and the regulations that apply to HCBS
- background on Medicaid State Plan services
- provisions of 1902(a) that are common areas for discussion in HCBS
- information on various authorities in Title XIX of the Social Security Act that provide for, interface with and complement HCBS, and
- basics on Pre-Admission Screening Resident Review (PASRR) and institutional coverage under the State plan.

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3:30 p.m. – 5:00 p.m.
(Continued)

PRESENTERS:

Suzanne Bosstick, Director, Division of Community and Institutional Services, Disabled and Elderly Health Programs Group, CMSO, CMS

Mary Sowers, Technical Director for HCBS, Disabled and Elderly Health Programs Group, CMSO, CMS

Anita Yuskas, Technical Director for Quality, Disabled and Elderly Health Programs Group, CMSO, CMS

Dan Timmel, Health Insurance Specialist, Disabled and Elderly Health Programs Group, CMSO, CMS

Preparing Aging Services for the Lesbian, Gay, Bisexual and Transgender 'Age Wave'

Commonwealth C

Track: Advancing Diversity

Lesbian, gay, bisexual and transgender (LGBT) Americans make up a highly marginalized but fast growing cohort of the 'age wave' who face, along with their caregivers, substantial barriers in accessing mainstream services. In this workshop, leaders in LGBT and mainstream aging services will join in a highly interactive and facilitated discussion focused on addressing these challenges by creating an 'open and affirming' delivery system for LGBT elders and caregivers.

In the context of existing efforts underway in Boston and New York, presenters will discuss:

- the challenges and opportunities associated with addressing sexual orientation, gender identity and HIV status on a policy level as well as in mainstream home and community based service settings
- specific obstacles encountered by LGBT elders and
- concrete strategies policymakers and service providers can implement to successfully improve access and quality of care.

PRESENTERS:

Dale Mitchell, Executive Director, Ethos

Lisa Krinsky, Director, LGBT Aging Project

Catherine Thurston, Director of Clinical and Social Services, Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders (SAGE)

SUNDAY, SEPTEMBER 28, 2008 CONTINUED

3:30 p.m. – 5:00 p.m.

(Continued)

Of, By, and For the People: Consumers Evaluating Home and Community Based Services Programs

Grand Ballroom C

Track: Consumer Direction/Self Determination

The Centers for Medicare and Medicaid services (CMS) have encouraged states to involve consumers of HCBS programs at all levels of policy development, implementation and evaluation in order to capitalize on their experience and focus programs on the true needs and concerns of the individuals and families they serve.

In this workshop, consumer representatives with mental illness, intellectual disabilities, and physical disabilities will provide examples of consumer-led research and evaluation activities that have helped improve the responsiveness and quality of state and local HCBS programs.

Workshop participants will learn about:

- methods for engaging consumers as research partners
- the training needed by consumer researchers and evaluators
- the challenges encountered by consumers and program administrators and
- the benefits of consumer involvement.

PRESENTERS:

Darlene (Dee) O'Connor, Director, Long Term Care Policy, Center for Health Policy and Research, UMASS Medical School

Jonathan Delman, Executive Director, Consumer Quality Initiatives

Nicole Lonerson, Center for Health Policy and Research, UMASS Medical School

Quality Care Connections: A Collaborative Partnership Model That Works

Grand Ballroom D

Track: Caregiver Supports

Around 15 million caregivers in the United States provide more than \$300 billion worth of unpaid services each year, almost twice as much as is spent on homecare and nursing home services combined. Given the growing strains of this “caregiver crisis,” family members and friends need hope that action can be taken now to help support them in their caregiving roles. Yet while many interventions have been developed with proven positive outcomes for caregivers, few have been translated into truly useful programs at the community level.

Participants in this workshop will learn about the advances achieved by the Alabama REACH project, one of those translational efforts

SUNDAY, SEPTEMBER 28, 2008 CONTINUED

3:30 p.m. – 5:00 p.m.
(Continued)



being carried out in partnership between the Alabama Department of Senior Services and the Center for Mental Health and Aging at the University of Alabama with funding from Quality Care Connections.

The session will focus on:

- the gap between the science and practice of caregiver support
- the work of Quality Care Connections, an initiative of Johnson & Johnson and the Rosalynn Carter Institute for Caregiving to enhance community based services for caregivers.
- the REACH initiative's efforts to improve the well being of caregivers and recipients, especially Alzheimer's disease caregivers, promote its activities statewide and encourage active volunteerism.

PRESENTERS:

Laura Bauer Granberry, Director of National Initiatives,
Georgia Southwestern State University

Irene Collins, Commissioner, Alabama Department of Senior Services

Louis Burgio, PhD, School of Social Work and Institute of Gerontology, University of Michigan

Transforming Quality for Long Term Care: States on Systems Transformation Grant Quality Initiatives

Grand Ballroom E

Track: Quality

Several states have focused their 2005 Systems Transformation Grants on the Quality Goal, which includes activities related to establishing comprehensive approaches to quality management across long term support systems.

In this Open Forum session, representatives from Massachusetts, Missouri, and New Mexico will share lessons learned from their work with their Systems Transformation Grants and seek to engage participants from other states about their work in tackling key issues related to quality management transformation. Methodologies and target populations for these states' Systems Transformation Grant activities vary, but include a system wide approach and a focus on mental retardation/developmental disabilities, older adults, people with physical disabilities and traumatic brain injuries.

Specific areas of discussion will include:

- strategies to engage consumers in quality management systems
- the implementation of continuous quality improvement methods at all agency levels, and
- the link between quality systems transformation and grant evaluation activities.

SUNDAY, SEPTEMBER 28, 2008 CONTINUED

<p>3:30 p.m. – 5:00 p.m. <i>(Continued)</i></p>	<p>PRESENTERS:</p> <p>Laney Bruner-Canhoto, Project Director II for Massachusetts Systems Transformation Grant Evaluation, Center for Health Policy Research, UMass Medical School</p> <p>Robin Rust, Project Director, Missouri Division of Mental Retardation and Developmental Disabilities</p> <p>Emily Kaltenbach, Acting Division Director, NM, Consumer and Elder Rights</p> <p>Mason Mitchell-Daniels, Project Director, Massachusetts Executive Office of Health and Human Services</p> <p>Heather Johnson-Lamarche and Robert Park, Massachusetts Systems Transformation Grant</p>
<p>5:30 p.m. – 7:00 p.m.</p>	<p>Opening Reception—Harbor Ballroom</p>
<p>7:00 pm – 9:00 pm</p>	<p>NASUA Board of Directors Dinner—Executive Board Room Convened by the National Association of State Units on Aging <i>(NASUA Member Event by Invitation with Separate Registration)</i></p>

MONDAY, SEPTEMBER 29, 2008

<p>7:00 a.m. – 5:00 p.m.</p>	<p>Home and Community Based Services Conference Registration—Commonwealth Foyer</p>
<p>7:30 a.m. – 8:00 a.m.</p>	<p>Continental Breakfast—Grand Ballroom Foyer</p>
<p>8:00 a.m. – 9:30 a.m.</p>	<p>Plenary—Grand Ballroom A-B</p> <p>Advancing Technology for Older Adults and Persons with Disabilities Joseph F. Coughlin, Director, AgeLab, Massachusetts Institute of Technology</p> <p>A Foundation for Progress: A Retrospective of Federal Initiatives in Home and Community Based Services Josefina G. Carbonell, Assistant Secretary for Aging, U.S. Administration on Aging, U.S. Department of Health and Human Services</p> <p>Dr. Tevi D.Troy, Deputy Secretary, U.S Department of Health and Human Services</p>

MONDAY, SEPTEMBER 29, 2008 CONTINUED

9:45 a.m. – 11:15 a.m.

Workshops

Aging and Disability Resource Centers: A Keystone to Broader Long Term Care Balancing Efforts

Alcott

Track: Systems Change

Forty-three states and territories have received demonstration grants from the Administration on Aging (AoA) and the Centers for Medicare and Medicaid Services (CMS) to develop Aging and Disability Resource Centers (ADRCs). ADRCs provide information and counseling on long term support options for people of all ages and income levels and serve as single points of entry for public long term support programs and benefits. Several states have used their ADRC programs as a focal point for broader state efforts to balance their long term care systems. Presenters in this workshop will describe ADRC development nationwide and discuss challenges and opportunities related to building partnerships, program implementation, expansion, and sustainability.

Specific highlights will include:

- an overview by the Lewin Group of state progress toward rebalancing and highlight different funding and systems change strategies states have used in concert with ADRC initiatives.
- a report by the National Association of State Units on Aging on how ADRCs build upon existing information and referral capacity, and
- a perspective from Massachusetts on how their ADRC initiative relates to their state's many long-term care reform efforts.

PRESENTERS:

Lisa Alecxih, Vice President, The Lewin Group

Heather Johnson-Lamarche, ADRC Project Director,
Massachusetts Executive Office of Elder Affairs

Bernice Hutchinson, Senior Policy Advisor, National Association
of State Units on Aging

Developmental Disabilities Waiver Managers Open Forum

Commonwealth A-B

Track: Consumer Direction/Self Determination

One purpose of program waivers is to provide a laboratory for diverse experiments at the state level that point the way to better approaches that can be adopted nationwide. This forum presents an opportunity for managers of state developmental disabilities HCBS waivers to share their findings, as well as focus on common issues and concerns. The discussion will include an overview of hot topics affecting HCBS developmental disabilities waivers and provide ample opportunities for waiver managers to ask each other questions and share exciting new practices.

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9:45 a.m. – 11:15 a.m.

(Continued)

PRESENTER:

Robin Cooper, Director of Technical Assistance, National Association of State Directors of Developmental Disabilities Services, Inc.

Consumer Direction and the Aging Network: An Update and Introduction of a New Technical Assistance Resource

Commonwealth C

Track: Consumer Direction/Self Determination

Consumer direction—the concept of offering consumers a greater sense of independence and control through the choice of traditional services or cash along with counseling assistance—is gaining increasing acceptance nationwide. The 2007 National Association of Area Agencies on Aging (n4a)/Scripps Gerontology Center annual assessment of the aging network found that 90% of all area agencies on aging (AAAs) ask consumers about their service preferences, and almost half of AAAs offer some consumer directed options. Yet the concept remains a relatively new one, and agencies are still in need of information and resources on how to develop and manage consumer-directed programs and address challenges such as quality assurance.

This presentation will highlight some of the research, data and tools available to guide program managers, including:

- findings from the n4a/Scripps assessment related to consumer direction based on data from 81% of all AAAs
- a new handbook providing hands-on guidance for aging network organizations interested in developing consumer directed programs, including a Cash and Counseling option
- in-depth information from the handbook on principles of consumer directed services, outreach and enrollment, development of program infrastructure and quality assurance measures.

PRESENTERS:

Lori Simon-Rusinowitz, Research Director, Cash and Counseling, University of Maryland Department of Health Services Administration

Kevin Mahoney, Director, Cash and Counseling National Program Office, Boston College

Suzanne R. Kunkel, Director, Scripps Gerontology Center

Abbe Linscott, Research Associate, Scripps Gerontology Center

Janet O’Keeffe, Senior Researcher, Research Triangle Institute

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9:45 a.m. – 11:15 a.m.
(Continued)

Increasing Opportunities for Elders' Self Direction

Grand Ballroom C

Track: Consumer Direction/Self Determination

Nationwide, Medicaid and state long term care programs have been increasing opportunities for elders to self direct. To prepare providers for this shift, the Massachusetts Executive Office of Elder Affairs and the Center for Health Policy and Research at UMASS Medical School embarked on a training project for Aging Service Access Points, the state's entry point for elder services. The training was based on the Consultant Training Program developed by the Boston College Center for the Study of Home and Community Life with modifications identified by a workgroup representing project sponsors, case managers/management, and Independent Living Centers. This session will delve into the workgroup process, the final product, and process and outcome evaluation results for both a regional pilot and statewide training programs. Presentations will also highlight valuable qualitative and quantitative data from pilot day of workshop and pre-post surveys evaluating process components and impacts on knowledge and attitudes toward consumer directed programs.

PRESENTERS:

Emma Quach, Project Director, Center for Health Policy and Research, UMASS Medical School

Erin McGaffigan, Consultant, Center for Health Policy and Research

David Centerbar, Project Associate, Center for Health Policy and Research

Home and Community Based Services: Partnering with Primary Care Providers in Low Income and Underserved Communities

Grand Ballroom D

Track: Supports for Community Living

Community Health Centers have carved out a key role as primary care providers serving disabled and elderly Medicaid enrollees in community settings. This presentation will discuss how collaboration with Home and Community Based Service providers has strengthened the safety net these community based primary care organizations offer in our health care system. The speakers will explore with the audience how primary care providers can continue to work most effectively with other home and community based providers to the benefit of the patients they mutually serve.



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9:45 a.m. – 11:15 a.m.

(Continued)

PRESENTERS:

Nancy Grano, Home and Community-Based Waiver Specialist,
CMS Boston Regional Office

Diane Erlandson, RN, MS, MPHA, Regional Coordinator,
HRSA Boston Field Office

Lori Abrams Berry, Executive Director, Lynn Community Health
Center, Lynn, Massachusetts

Ron Airey, Executive Director, Greater Lynn Senior Services

**Preventing Falls and Promoting Health Through Community
Collaboration: The Evidence is In**

Grand Ballroom E

Track: Consumer Direction/Self Determination

Evidence is increasing that healthy aging of individuals and communities can be encouraged and influenced through use of tested evidence based health promotion disease prevention models and interventions.

This workshop will feature the development and results of three such evidence based community programs:

- evidence models being implemented in Massachusetts to prevent falls, encourage healthy eating, and support self management of chronic disease
- efforts by the U.S. Administration on Aging (AoA) to expand access to diabetes self management under Medicare, and
- falls prevention models being tested by the Agency for Health Care Research and Quality (AHRQ) in assisted living settings.

PRESENTERS:

Patricia Kelleher, Executive Director, Home Care Alliance of
Massachusetts

Edith Walsh, Senior Research Associate, Aging Disability and
Long Term Care, RTI Internaional

Laurie Galvin, Rehabilitation Manager, Norwell Visiting Nurse
Association

Sandra Tocman, Senior Planning and Development Specialist,
Massachusetts Executive Office of Elder Affairs

Rob Schreiber, Physician in Chief, Hebrew Senior Life

David Dietz, Aging Program Specialist, U.S. Administration on
Aging

MONDAY, SEPTEMBER 29, 2008 CONTINUED

9:45 a.m. – 11:15 a.m.
(Continued)

How to Work with Nursing Facilities to Downsize and Reconfigure Their Assets to Meet Changing Market Realities and Reinvest the Medicaid Savings

Hancock

Track: Systems Change

Nursing facilities are finding the need to downsize and reconfigure their assets in the face of growing demand for home and community based services and other changing market realities. This session will describe how Pennsylvania is working with the nursing facility industry to address constraints and overcome obstacles to downsizing.

Highlights will include:

- a description of the incentives and team of specialists established by the Commonwealth to support downsizing, and
- Pennsylvania's efforts to reinvest the resulting Medicaid savings in rate enhancements and capital formation that support the development of more community-based infrastructure.

PRESENTERS:

James Pezzuti, Director, Bureau of Community Development, Office of Long Term Care Living, Departments of Public Welfare and Aging

Virgil Hughes, Director, Division of Total Senior Care Solutions, Bureau of Community Development

Managing Risk While Supporting Consumer Decision Making in Options Counseling

Otis

Track: Consumer Direction/Self Determination

A major goal of Aging and Disability Resource Centers (ADRCs) is to promote informed decisions about long term care and supports through options counseling. Options counseling is an interactive decision support process whereby consumers, family members and significant others are supported in their deliberations to determine appropriate long term care choices in the context of the consumer's needs, preferences, values, and individual circumstances. This workshop will discuss the challenge to developing community based plans created by the need to balance a client's right to make these choices, including potentially unhealthy or unsafe ones, with the imperative to assure the safety and health of the client.

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9:45 a.m. – 11:15 a.m.
(Continued)

This session will feature an overview of the “five Ws” of options counseling within the ADRC context:

- Who delivers options counseling
- What protocols are followed
- When it occurs
- Where it occurs, and
- Why is it important to track results.

PRESENTERS:

Mary DeRoo, Director of Client Services, Elder Services of the Merrimack Valley, Inc.

Gilbert Thompson, Senior Associate, The Lewin Group

Kris Baldwin, Assistant Chief Administrator, Arkansas Division of Aging and Adult Services

Carrie Blakeway, Senior Manager, The Lewin Group

Adult Foster Care for Older Adults: Policy Trends and Models

Stone

Track: Supports for Community Living

Adult Foster Care (AFC) services represent a promising method of promoting independence and consumer choice for older adults in need of support services. To gauge progress in capitalizing on this opportunity, the AARP Public Policy Institute (PPI) and its partners, the National Academy for State Health Policy and NCB Capital Impact, are conducting the first national review of state AFC policies and programs since 1996, as well as taking an indepth look at the AFC provider marketplace in nine states.

In this session, PPI will present its research findings and offer participants:

- an overview of AFC programs including the number of states using the model, trends in use of the service (e.g., who uses AFC), AFC’s role in state long term care continuum, licensure and oversight requirements
- AFC marketplace trends including single owner versus commercial chain approaches, typical services, and mix of payers and
- state policy and program objectives associated with AFC programs for older adults.

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9:45 a.m. – 11:15 a.m.

(Continued)

PRESENTERS:

Jean C. Accius II, PhD, Policy Research Analyst, AARP Public Policy Institute

Michael Cheek, Director, NCB Capital Impact

Susan Reinhard, Senior Vice President, AARP Public Policy Institute

Bob Mollica, Senior Program Director, National Academy for State Health Policy

Where Isn't PACE in Pennsylvania?

Webster

Track: Supports for Community Living

Started as a small demonstration in 1998 in Pennsylvania, the national Program of All-inclusive Care for the Elderly (PACE) has expanded to 11 operational providers operating 18 PACE centers around the state, with an additional five programs expected to be operational by early 2009. Pennsylvania has implemented two of the nation's only 'for-profit' PACE programs under a federal demonstration, and two of fifteen national CMS rural PACE grant awards. More recently, an initiative was established to expand ties between the local Area Agencies on Aging, state staff and PACE providers to maximize cooperation and develop a true continuum of long term care services for Pennsylvania seniors who need them. In this workshop, a panel of state staff managing PACE, PACE providers, and the state Association of Area Agencies on Aging will share their successes and future plans with participants considering this rapidly growing community based option.

In particular, panelists will focus on:

- key strategies in successful development of PACE as part of the continuum of care
- potential areas of expansion including collaborations with public housing providers in an effort to create affordable assisted living models and efforts to expand PACE from densely populated to suburban/rural areas
- the willingness of organizations to compete to provide services under the model and the resulting benefits.

PRESENTERS:

Cindy Proper, Director, Division of Integrated Care, Pennsylvania Office of Long Term Living

Amy Minnich, Executive Director, LIFE Geisinger

Mark Irwin, Executive Director, Pennsylvania PACE

Crystal Lowe, Executive Director, Pennsylvania Association of Area Agencies on Aging

MONDAY, SEPTEMBER 29, 2008 CONTINUED

11:30 a.m. – 1:30 p.m.

Plenary with Lunch—Grand Ballroom

Strengthening the Medicaid Home and Community Based Services Option

Senator John Kerry, (D-MA)

A Town Hall Meeting: Balancing Long Term Services and Supports

Long Term Services and Supports (LTSS) system balancing is one of the “hot” issues in state Medicaid programs. In this session, the AARP Public Policy Institute will address several fundamental questions:

- What do we mean by the term “balancing” or “rebalancing?”
- How can we measure whether states have balanced their long-term care systems?
- What constitutes a reasonable balance between institutional services and home and community-based services?
- What is a reasonable pace of change?
- Why have some states balanced more successfully than others?
- Is there a limit to what states can achieve under current Medicaid law?
- What have we learned that can inform the healthcare reform discussions at the federal level?

AARP will be joined by a panel of experts who discuss how their states have overcome barriers to system balancing and are delivering more services to people in their homes or in more home-like settings in their communities. There will be an opportunity for an open dialogue with the audience to discuss these critical issues.

Susan Reinhard, Senior Vice President, AARP Public Policy Institute

Dennis Streets, Director, North Carolina Division of Aging and Adult Services

Ann Kohler, Director of the National Association of State Medicaid Directors

Kathy Greenlee, Secretary of the Kansas Department on Aging

1:30 p.m. – 2:15 p.m.

Exhibit Hall Opening with Dessert

MONDAY, SEPTEMBER 29, 2008 CONTINUED

1:30 p.m. – 4:30 p.m.

Intensive

Pre-registration with Fee

Direct- Service Workforce: Needs, Challenges and Intervention Strategies—Adams

By 2016, America will need 1 million additional direct-service workers—personal care assistants, home health aides, and nursing aides—to care for aging baby boomers and growing numbers of people with disabilities. The total direct-service workforce will grow to 4 million workers, more than the total number of teachers needed to educate America's youth. Meeting this escalating demand is a significant challenge, as 97% of states report serious difficulty recruiting and retaining direct-service workers according to a national survey conducted in 2007. For service providers and states' home and community-based services (HCBS) programs the workforce challenges coincide with changes in long-term care policies for expanding HCB services. Workforce data is helping providers and state policy makers focus attention on gaps and shortages, and while HCBS demands are increasing, the policy analysts are recommending that a commensurate emphasis on direct-service workforce policies is essential.

This session will provide an overview of the direct service workforce challenges and the initiatives being researched and developed to address them. Participants will gain background information about the workforce and a framework for identifying and implementing recruitment and retention strategies; be introduced to strategies and model programs in the areas of wages/benefits, supervision, recruiting, training, workforce monitoring and data collection; and a state sponsored incentive program for workforce development. Copies of reference documents will be available at the session.

This session will include presentations by recognized policy analysts and program practitioners, and opportunities for participants to raise issues and questions for discussion. The presenters include:

PRESENTERS:

Carrie Blakeway, MPA, Senior Manager at The Lewin Group
Wendy Drastal, RN, MBA, Vice President of Home Care, Inc.,
 a sister affiliate of Home Health VNA and Merrimack Valley
 Hospice in Lawrence MA

Lee Goldberg, MS, JD, Director of Long Term Care Policy
 Service Employees International Union (SEIU)

Lisa Gurgone, MS, Executive Director of the Massachusetts
 Council for Home Care Aide Services (Council).

Susan Harmuth, Director, North Carolina Foundation for
 Advanced Health Programs Project Coordinator for NC
 NOVA (New Organizational Vision Award)

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1:30 p.m. – 4:30 p.m.

(Continued)

Liz Osbahr, RN, President and Owner of Classic Home Care, Inc
Elise Scala, MS, Research Associate, Health Policy Institute,
 Muskie School of Public Service, University of Southern Maine
Dorie Seavey, PhD, Director of Policy Research, PHI National
Bernadette Wright, PhD, Senior Associate, Lewin Group

2:30 p.m. – 4:00 p.m.

Workshops

Primary Care House Calls: Serving the Frail Elderly in the Medical Home Model

Alcott

Track: Supports for Community Living

Primary care house calls are relevant and necessary today for select populations of chronically ill individuals. With the reemergence of the medical home model and a shift toward community based aging, house calls fill a vital role for community based agencies striving to meet the needs of the frail elderly. This interactive presentation will address the contemporary clinical and economic realities that make house calls appropriate and economically feasible. The economic and competitive advantages to the sponsoring organization will be discussed and situational examples will be used as a case study for discussion.

The session will highlight:

- the strategic, financial, and community benefits gained by the sponsor of a financially self sustaining House Call Program
- the basics of planning, start-up, and operations of the House Call Program, including the length and amount of financial commitment, the availability of grant support, operating principles, typical growth and time to program financial self sufficiency
- a case study of successful House Call Programs.

PRESENTER:

Brent Feorene, President, House Call Solutions

Livable Communities—What Does it Mean and How Do We Start the Process?

Grand Ballroom E

Track: Supports for Community Living

Communities can be the places where people of all ages and abilities can live comfortably throughout the lifespan, but this does not happen automatically. It takes commitment, knowledge, and collaboration to bring the appropriate people and organizations together to start a thoughtful planning process. This workshop will discuss both

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2:30 p.m. – 4:00 p.m.
(Continued)

national and local initiatives and tools for planning livable communities. Representatives from two local communities will describe their experiences, and participants will have an opportunity to participate in an interactive discussion to share their ideas and ask questions.

The session will examine in detail:

- the various steps required to achieve livable communities, including awareness-raising, finding a convener, identifying stakeholders, developing a common vision and setting goals, and
- some of the key features developed in livable communities, from sidewalks to lighting to transportation, and their value to residents.

PRESENTERS:

Sandy Markwood, CEO, National Association of Area Agencies on Aging

Helen Eltzeroth, Deputy Director, National Association of Area Agencies on Aging

Trends in Lifespan Communities: NORCs and Village Movement

Commonwealth A-B

Track: Supports for Community Living

Naturally Occurring Retirement Communities—existing residential areas where older people are essentially “aging in place” as opposed to locating in a specific planned community—are increasingly recognized as a unique opportunity to deliver services. The goal of this workshop is to provide participants with a description of how two organizations have developed and expanded the Naturally Occurring Retirement Community (NORC) concept in three Massachusetts communities.

Participants will learn:

- New and old definitions of a NORC
- The role of NORCs in promoting home and community based alternatives to institutional care
- Keys to success, in particular, the broad variety of partnerships—public/private, financial, and in-kind—that make these supportive housing programs work and
- Ways to evaluate and measure outcomes in order to build a case for continued funding.

PRESENTERS:

Michael Cheek, Director, NCB Capital Impact

Rimma Zelfand, JFCS Boston

Anya Nawrocky, Senior Program Manager, United Hospital Fund

Judy Willet, Executive Director, Beacon Hill Village

Gail Kohn, Executive Director, Capitol Hill Village



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2:30 p.m. – 4:00 p.m.

(Continued)

Managed Long Term Care, Part 1: Present and Future Legal Authorities

Commonwealth C

Track: CMS Workshop Series

This session will address Medicaid authorities currently available to CMS and states to develop managed care programs that include institutional and community-based services, and allow for increased coordination with Medicare Special Needs Plans. Following presentation from CMS and state representatives, the audience will be invited to identify ways in which CMS can help build capacity and streamline authority in this area. *Note:* Please join us for Part 2 of this session, on Tuesday at 2:00 p.m., when we will address operational issues involved in launching managed long term care programs.

PRESENTERS:

Darlene “Dee” O’Connor, Director, Long-Term Care Policy, Center for Health Policy and Research, University of Massachusetts Medical School

Suzanne Bosstick, Director, Division of Community & Institutional Services, Disabled and Elderly Health Programs Group, CMS

Mary Sowers, Technical Director for HCBS Waivers, Division of Community & Institutional Services, Disabled and Elderly Health Programs Group, CMS

Larry Heyeck, Deputy Director, Medical Assistance Division, New Mexico

Diane Flanders, Director of Coordinated Care Systems, MassHealth Office of Long Term Care

Voices Of Experience: Tools for Overcoming Resistance to Consumer Direction

Grand Ballroom C

Track: Consumer Direction/Self Determination

While Cash and Counseling programs offer substantial benefits in terms of empowering consumers, they have often been the object of resistance from agencies and other groups. This session will focus on how states implementing a Cash and Counseling program dealt with these obstacles.

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2:30 p.m. – 4:00 p.m.
(Continued)

Specifically, the session will:

- present a tool kit that states can use to mitigate such resistance, and
- discuss how states can prevent such resistance and better work with providers to make consumer-directed programs a success.

PRESENTERS:

Caroline Broder, Senior Health Policy Associate, Cash and Counseling/Burness Communications

Debby Ellis, Program Director, Independent Choices Program, Arkansas Department of Health and Human Services

William Ditto, Program Director, New Jersey Personal Preference Program

Jane Vujovich, Strategic Policy Specialist, Minnesota Department of Human Services

Preparing for the Elder Wave: Projecting Long Term Care Needs and Resources

Grand Ballroom D

Track: Systems Change

Are states prepared to meet the demand for all types of long term care services as the population ages? What home and community based services and facility based resources will be needed in five years, ten years, and beyond? How can states determine differing needs in various regions? How will demand and resources match up? How can states get geared up? This workshop focuses on the importance, mechanics, and policy implications of assessing and projecting needs, resources, and costs, in order to assure that States are ready for the elder wave.

The panel will:

- Explore the imperative felt by Maine to engage in this seminal planning
- Describe the projection model that has been developed which utilizes demographics, disability rates, and home and community based services and nursing home use rates
- Demonstrate the power of a state, university and national partnership in doing this work
- Consider the implications of this work for policymakers, and
- Feature a give and take conversation with the audience about this important work.

MONDAY, SEPTEMBER 29, 2008 CONTINUED

2:30 p.m. – 4:00 p.m.
(Continued)

PRESENTERS:

Diana Scully, Director, Maine Office of Elder Services,
Department of Health and Human Services
Julie Fralich, Associate Director, Muskie School of Public Service,
University of Southern Maine
Lisa Alecxih, Vice President, Lewin Group

Changing Times, Changing Attitudes: Maine's Effort to Shrink the Role of Guardianship in an Era of Self Direction

Hancock

Track: Consumer Direction/Self Determination

The new self determination movement is challenging states to build more self directed services for individuals with disabilities. At the same time, an overreliance on guardianship undermines progress toward self direction for people with cognitive disabilities: too often we assume that people with cognitive disabilities should not have the legal right to make decisions for themselves.

This presentation will describe Maine's efforts to challenge this assumption and to promote alternatives to guardianship.

Presenters will:

- describe a collaborative process for systems change involving the engagement of clinical, judicial and other stakeholders
- share educational materials, training for clinicians, court visitors, attorneys and judges, and
- demonstrate assessment tools adapted to promote more consistent and appropriate guardianship determinations.

PRESENTERS:

Vanessa Bell, Project Director, Muskie School of Public Service,
University of Southern Maine
Bill Hughes, Developmental Services Program Manager, Maine
Department of Health and Human Services Developmental
Services

HIV Positive Over 50: We Are All at Risk

Otis

Track: Consumer Direction/Self Determination

The onset of aging does not provide immunity from the risk of contracting or living with HIV/AIDS. Service providers for older adults need to be aware of and prepared to address the condition and its implications. In this presentation, people who are over 50 and liv-

MONDAY, SEPTEMBER 29, 2008 CONTINUED

2:30 p.m. – 4:00 p.m.
(Continued)

ing with HIV/AIDS—but not letting it run their lives—will provide basic information about HIV, share personal stories about living with the virus, the value of getting tested and receiving treatment, and answer questions from the audience.

The presentation will focus on:

- risk factors for older adults
- modes of transmission
- the stigma and discrimination associated with HIV/AIDS
- the importance of identifying the population and getting people into treatment to live normal and productive lives, and
- the work of the State of New Mexico HIV/AIDS Consumer Advocate Program with Aging & Long-Term Services, which has been designed to offer advocacy for all health care and HIV support services including patient navigation, referrals, peer-to-peer counseling, grievance process support, and grievance resolution.

PRESENTER:

Wm. Steve Garrett, HIV/AIDS Consumer Advocate,
New Mexico Aging & Long-Term Services

The Freedom Trail: Independence Through Community Housing Alternatives

Stone

Track: Housing

Accessible, affordable housing is a critical factor in promoting consumer independence as a rebalancing strategy. The creation of such housing with services requires more than just policy changes—partnerships must be forged among government, community housing developers, and local service providers. The availability of strategies for home modification and assistive technology provide opportunities for seniors and people with disabilities to remain connected to the community. This workshop will present multifaceted housing strategies to provide wider choice and promote independence for people with disabilities of all ages.

In particular, the session will focus on:

- The Massachusetts Going Home Program, which converts existing housing units to provide 24-hour personalized care in ranch style homes of four to five residents each, and
- the Caring Homes Project—an alternative to nursing homes using family members as paid caregivers within an Adult Family Care model.

MONDAY, SEPTEMBER 29, 2008 CONTINUED

2:30 p.m. – 4:00 p.m.

(Continued)

PRESENTERS:

Candace Baldwin, Senior Policy Advisor, NCB Capital Impact
Jean Wood, Director, Minnesota Board on Aging
Al Norman, Executive Director, Massachusetts Home Care
Paul L. Lanzikos, Executive Director, North Shore Elder Services

A Methodology for Projecting a State's Long Term Care Costs

Webster

Track: Systems Change

With rising long term care costs an increasing concern for state policymakers, the Maryland General Assembly mandated a forward looking report entitled, *Long-Term Services and Supports in Maryland: Planning for 2010, 2020, and 2030*. This report was prepared by The Hilltop Institute at University of Maryland Baltimore County in collaboration with the Center for Social Science Research at George Mason University and the Maryland Health Care Commission. This session will present the report's methodology for estimating a state's future long term care costs and assisting them in planning for and dealing with the growing needs for long-term support.

Specifically, participants will learn about:

- The challenges to defining and estimating future disability in a state's population
- The use of Medicaid and other trend data to inventory and estimate future long term care costs related to institutional care, home and community based services, housing, and transportation, as well as for individuals with serious mental illness and persons with developmental disabilities
- The expected impact of trends in disability, informal supports, consumer preferences, affordability, the workforce, and technology on long term care utilization and costs and how projections can be weighted to reflect such trends
- Guidelines for state policymakers to consider in planning for the future.

PRESENTERS:

Cynthia Woodcock, Director, Long-Term Supports and Services, The Hilltop Institute, University of Maryland Baltimore County
Al Adamson, Manager, Health Services Research, The Hilltop Institute, University of Maryland Baltimore County

4:30 p.m. – 6:00 p.m.

Reception—Galleria Hall

TUESDAY, SEPTEMBER 30, 2008

7:00 a.m. – 5:30 p.m.	Home and Community Based Services Conference Registration— Commonwealth Foyer
7:30 a.m. – 8:30 a.m.	Continental Breakfast—Grand Ballroom Foyer
8:30 a.m. – 10:00 a.m.	<p>Plenary—Grand Ballroom A-B</p> <p>Changing Administrations: Implications for Serving Diverse Populations</p> <p>A. Bernice Hutchinson, Senior Policy Advisor, National Association of State Units on Aging</p> <p>Nancy Thaler, Executive Director, National Association of State Directors of Developmental Disabilities Services (NASDDDS)</p> <p>Ann Kohler, Director, National Association of State Medicaid Directors (NASMD)</p> <p>Daniel Schoeps, Director, Long Term Care Purchasing, U.S. Veterans Health Administration</p> <p>Charles D. Johnson, Director, Illinois Department on Aging</p>
10:15 a.m. – 11:45 a.m.	<p>Workshops</p> <p>The State Employment Leadership Network: Partnerships Among State Systems to Improve Employment Outcomes</p> <p><i>Alcott</i></p> <p><i>Track: Employment</i></p> <p>Established in 2006, the State Employment Leadership Network (SELN) is a multi-state technical assistance collaborative assisting 16 state agencies in improving employment outcomes for people with developmental disabilities. In this session, representatives of the National Association of State Directors of Developmental Disabilities Services (NASDDDS) and the Institute for Community Inclusion at the University of Massachusetts Boston (ICI), who lead the network, will present the goals, structures, and activities of the SELN. Speakers from SELN member states will discuss their partnerships with state vocational rehabilitation and education agencies to promote a community employment agenda and help Medicaid Waiver participants get better and more satisfying jobs, as well as the challenges they have faced. Presenters will make available a variety of materials developed in response to SELN cross cutting issues.</p>

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.

(Continued)

PRESENTERS:

Rie Kennedy-Lizotte, Project Manager, National Association of State Directors of Developmental Disabilities Services

John Butterworth, PhD, Adjunct Assistant Professor, UMASS Boston, Institute on Community Inclusion

Al Orlofsky, Program Manager, Colorado Division for Developmental Disabilities

Dana Olsen, Program Manager, Bureau of Quality Improvement and Policy, Pennsylvania Office of Developmental Programs

Home and Community Based Services: Waiver Basics, State Plan Option, Quality and State Experiences

Commonwealth A-B

Track: CMS Workshop Series

Over the last two decades, the initial institutional bias in Medicaid has been steadily reduced—and the independence and quality of life of program beneficiaries increased—through a steady expansion of the options available to provide long term services and supports in home and other community settings. This session will provide an overview of these Home and Community Based Services (HCBS) in Medicaid, including the vehicles available to States for offering HCBS, will provide some program basics and features, as well as quality requirements.

Other highlights will include:

- one State's journey to align its 1915(c) HCBS waiver program with Federal requirements, and
- an illustrative example of the partnership the Centers for Medicare and Medicaid Services (CMS) seeks to establish with states as work is undertaken to improve program structure and operations.

PRESENTERS:

Suzanne Bosstick, Director, Division of Community and Institutional Services, Disabled and Elderly Health Programs Group, CMSO, CMS

Mary Sowers, Technical Director of HCBS, Disabled and Elderly Health Programs Group, CMSO, CMS

Anita Yuskas, Technical Director for Quality, Disabled and Elderly Health Programs Group, CMSO, CMS

Dan Timmel, Health Insurance Specialist, Disabled and Elderly Health Programs Group, CMSO, CMS

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.
(Continued)

**Nursing Home Diversion Modernization Initiative:
Modernizing the Aging Network's Role in Long Term Care**

Commonwealth C

Track: Systems Change

The Administration on Aging's (AoA) Nursing Home Diversion Modernization (NHDM) grant program is designed to assist individuals at risk of nursing home placement and spend down to Medicaid with home and community based services that enable them to continue to live in the community. The NHDM program is administered through State Units on Aging, in partnership with Area Agencies on Aging and in collaboration with community aging service providers and other key stakeholders. During this session, representatives from AoA will describe the NHDM initiative and how grantees are transforming existing funding under the Older Americans Act, or other non-Medicaid sources, into flexible, consumer directed service dollars that can more easily meet the unique needs and preferences of the individual.

The workshop will also focus on:

- approaches states are taking to modernize their long term care systems through NHDM, and
- descriptions by three grantees of their projects and how NHDM fits into their overall long term care reform efforts.

PRESENTERS:

Greg Case, Senior Policy Analyst, Office of Planning & Policy Development, U.S. Administration on Aging

Melissa Morton, Field Representative, Department of Social Services, Connecticut Bureau of Aging, Community and Social Work Services

Barbara Reynolds, Deputy Commissioner, West Virginia Bureau of Senior Services

Heather Johnson Larmarche, Project Manager, Vermont Department of Disabilities, Aging and Independent Living



TUESDAY, SEPTEMBER 30, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.

(Continued)

More than Words: Fostering Understanding and Collaboration Between Culturally and Functionally Different Communities

Grand Ballroom C

Track: Advancing Diversity

As with other service providers, the changing face of America is increasingly requiring states to improve their ability to extend aging and disability services to culturally and functionally different communities. In this workshop, presenters will offer case studies of three programs that have tackled this challenge head on.

Highlights will include:

- an interactive exploration of the philosophies, unique characteristics, contributions, common processes, and shared responsibilities of the aging and disability networks through the lens of North Carolina's Aging and Disability Resource Center (ADRC) initiative
- the efforts of member agencies of Boston's Multicultural Coalition on Aging to build capacity to increase the cultural relevance of their products or services, respond to changes in client racial and linguistic diversity, respond to the increased competition and dwindling resources, and find new partners for collaborative development of programs and materials, and
- the development by the Massachusetts Senior Medicare Patrol Program of interdisciplinary collaborations to ensure the delivery of culturally and linguistically competent services.

PRESENTERS:

Sabrena Lea, Access Coordinator/State ADRC Project Director, North Carolina Department of Health and Human Services

Renee Cummins, Executive Director, Disability Rights Advocates

Marcie Becker Fereeman, Chair, Multicultural Coalition on Aging, Director, Outreach and Recruitment, Institute for Aging Research, Hebrew SeniorLife

Lucilia Prates, Director, Massachusetts Senior Medicare Patrol Program, Elder Services of the Merrimack Valley, Inc.

Marie Yves-Rose Chrispin, Refugee and Immigrant Services Program Coordinator, Haitian American Public Health Initiatives

Marion Aspinall, Director of Senior Health Insurance Counseling and Assistance Program (SHINE), Massachusetts Executive Office of Elder Affairs

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.

(Continued)

Maryland's Experience Building Systems to Facilitate Community Integration and Empower Program Participants

Grand Ballroom D

Track: Supports for Community Living

Maryland has made steady progress rebalancing its long term support system. However, there is a lack of basic infrastructure that allows individuals to navigate that web freely and ensures that they do not get stuck in a support arrangement that does not meet their needs. This symposium will review how the state has taken advantage of a number of federal approaches to address these needs through a series of separate initiatives that were ultimately coordinated and integrated in a manner that demonstrates that the whole is greater than the parts. The workshop will also provide an opportunity for representatives from other states to provide input and guidance regarding Maryland's efforts.

Initiatives to be highlighted include:

- the Maryland Access Point (MAP), the state's Aging and Disability Resource Center (ADRC) effort
- the restructuring of the state's home and community based services waivers
- the U.S. Administration on Aging sponsored nursing home diversion modernization program, and
- a Centers for Medicare & Medicaid Services sponsored Money Follows the Person initiative.

PRESENTERS:

Stephanie Hull, Chief, Housing Division Project Manager,
Maryland Department of Aging

Lorraine Narwara, Director, Money Follows the Person
Demonstration, Maryland Department of Health and Mental
Hygiene

Steven Lutzky, President, HCBS Strategies

Donna Smith, Director, Maryland Access Point, Maryland
Department of Aging

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.

(Continued)

**From Program Focused to Person Centered:
Changing the Culture of a Human Services Agency**

Grand Ballroom E

Track: Consumer Direction/Self Determination

Across the country, agencies are being challenged to provide person centered and self directed services that respond to the needs, hopes and dreams of diverse people. This presentation will focus on one non-profit agency's use of a range of approaches to move from a system of services bound by "siloed" funding sources, program models and driven by state and provider agency staff to one directed in meaningful ways by elders, people with disabilities and families that advocates, provides residential, day, employment supports, comprehensive family, clinical, and emergency services to 10,000 individuals and their families in Massachusetts.

The workshop will feature strategies employed by advocates including:

- major administrative restructuring
- education and training of staff from direct support professionals to senior management
- helping individuals with disabilities develop the skills required to self-direct
- integration of peer support
- more person centered planning and thinking in all aspects of the organization
- developing new cultural competencies
- breaking down barriers between agency staff and people receiving supports,
- the integration of individuals in multiple ways in agency operations, and
- a partnership with BayPath Elder Services to a new initiative with Massachusetts Executive Office of Elder Affairs to support self direction for elders.

PRESENTERS:

Jeffrey Keilson, Vice President of Strategic Planning and Development, Advocates, Inc.

Christine Pearson, Director of Human Resources, Advocates, Inc.

Tom Wagner, Director of Operations, Advocates, Inc.

Steve Corso, Training and Quality Director, BayPath Elder Services

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.

(Continued)

Making Emergency Preparedness Accessible to All

Hancock

Track: Supports for Community Living

Since 2006, Massachusetts has implemented a groundbreaking collaborative process in emergency preparedness among state policymakers, emergency management professionals, and people with disabilities. This workshop will provide an overview of the state's process, lessons learned, and recommendations to other states as well as another state's challenges and strategies to supporting people with disabilities during emergencies.

The session will highlight:

- the convening of a multidisciplinary, cross disability task force to ensure emergency preparedness activities are sensitive to the needs of elders, people with disabilities, and others who require assistance, and
- a two-year collaboration by the Massachusetts Department of Mental Retardation and the E.K. Shriver Center to enhance personal preparedness opportunities for people with intellectual disabilities.

PRESENTERS:

Richard E. Petty, Program Director, Independent Living Research Utilization (ILRU)

Erin McGaffigan, Senior Project Director, E.K. Shriver Center, UMASS Medical School

Diane Enochs, Assistant Commissioner, Massachusetts Department of Mental Retardation

Louise Arnold, Accessibility and Inclusion Planner, Massachusetts Emergency Management Agency

Dennis Mitchell, Statewide Emergency Management Coordinator, Connecticut Department of Developmental Services



TUESDAY, SEPTEMBER 30, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.
(Continued)

Restructuring Quality Management: Lessons Learned from Pennsylvania

Otis

Track: Quality

The Pennsylvania Office of Long Term Living (OLTL) is beginning the implementation of an innovative approach to meet the growing demand for quality in HCBS waiver programs. This session will discuss OLTL's new Quality Management System (QMS), the goal of which is to better meet the six CMS waiver assurances but which has applications across the Commonwealth's waiver programs.

In particular, the workshop will highlight:

- QMS's reliance on the foundational elements of discovery, remediation, and implementation—specifically, its definition of duties related to the definition of quality, the reporting of quality assurance on a regular basis using consistent formats and mechanisms and independent parties, and the review of findings using a stakeholder centric Quality Council model
- OLTL's work with Navigant Consulting to design the new QMS, develop the roles and responsibilities of the entities involved, and implement the new QMS with full stakeholder input and feedback, and
- OLTL's lessons learned, from conception of the new QMS through the writing of its new version 3.5 Attendant Care and Aging HCBS waivers.

PRESENTERS:

Cathy Anderson, Director, Navigant Consulting, Inc.

Michael Hale, Director of Quality Management, Metrics and Analytics, Office of Long Term Living, Commonwealth of Pennsylvania

Katie A. Hayman, Managing Consultant, Navigant Consulting, Inc.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.

(Continued)

The Role of the Long Term Care Ombudsman in a Modernizing Long Term Care System

Stone

Track: Supports for Community Living

This session will examine the role of a traditional long term care ombudsman as the aging network continues to expand Home and Community Based Services. The Older Americans Act mandates that every state have a state long term care ombudsman office to advocate on behalf of long-term care facility residents. As the aging network moves towards a model that offers more home and community based services, seniors are remaining in their homes in higher numbers and for longer periods of time than ever before. What resources and challenges need to be considered in order to expand the role of the ombudsman?

The session will explore and include discussion of :

- challenges facing the ombudsman in home and community based services
- resources involved in complaint handling in home and community based services
- the need for an Ombudsman to advocate for residents that receive home and community based services.
- information from NASUA and the Ombudsman Resource Center, including a report titled, “Charting the Long-Term Care Ombudsman’s Role in a Modernized Long-Term Care System” and a forthcoming project on the resources needed for handling complaints.

PRESENTERS:

Jessica Barker, Policy Associate, National Association of State Units on Aging

Lori Smetanka, Director, National Long Term Care Resource Center

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.

(Continued)

Targeted Case Management in Home and Community Based Services Programs

Webster

Track: Quality

New federal regulations limiting the use of targeted case management (TCM) in Home and Community Based Services (HCBS)—currently under a moratorium but scheduled to take effect on April 1 absent additional Congressional action—took many Medicaid directors, disability directors, and state unit on aging directors by surprise. TCM had been widely used to ensure high quality and appropriate supports and services for those needing the waiver.

Presenters in this workshop will explore:

- the rationale for including HCBS in the targeted case management regulation
- state actions to adjust their programs to TCM
- means for states to ensure high quality programming without TCM

PRESENTERS:

Martha A. Roherty, Executive Director, National Association of State Units on Aging

Ann Kohler, Director, National Association of State Medicaid Directors

Dennis Smith, Visiting Fellow, Center for Health Policy Studies, Heritage Foundation

Nancy Thaler, Executive Director, National Association of State Directors of Developmental Disabilities Services

12:00 noon – 12:45 p.m.

Lunch—Grand Ballroom A-B

12:45 p.m. – 2:15 p.m.

Poster Sessions and Exhibits with Dessert—Exhibit Hall

Poster Session: Promoting Economic Security: A Frame for Increasing Access to Home and Community Based Long Term Care Services

Systems Change

The Elder Economic Security Initiative is a broad based research, organizing, and advocacy effort to ensure economic security for elders nationwide.

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12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

A key component of the initiative is the Elder Economic Security Standard Index, a research based measure of income adequacy that is tabulated on the state and county level, as a tool for assessing and increasing access to income supports as well as home and community based long term care services.

This session will share how the Index is being used in MA and PA to inform policy and program development. Participants will also engage in an interactive exercise demonstrating how this tool could be used in their states.

PRESENTERS:

Ramsey Alwin, Director of the National Elder Economic Security Initiative, Wider Opportunities for Women

Jan Mutchler, Professor of Gerontology and Associate Director for Social and Demographic Research, Gerontology Institute at the University of Massachusetts Boston

Ann Hartstein, Executive Director, Massachusetts Association of Older Americans, Inc.

Paul McCarty, Executive Director, Intra-Governmental Council on Long Term Care, Pennsylvania Department of Aging

Poster Session: Reducing Loneliness in Community Long Term Care
Supports for Community Living

Loneliness, especially among the elderly, has been shown to have significant detrimental impact upon both mental and physical health including high blood pressure, undermined learning and memory, poor sleep quality and benefits, heart disease, Alzheimer's, genetic damage, a hampered immune system, chronic illness, low self-rated health, and depression. Home and Community Based Services (HCBS) provide an opportunity to address loneliness and its damaging effects.

This session presents the findings of the South Carolina Community Long Term Care (CLTC) program's annual Participant Experience and Satisfaction survey, which included the UCLA Loneliness Scale, considered the standard for measuring the phenomenon. The session will highlight several factors identified in this statewide sample of 423 participants that could be influenced by case managers and a range of strategies for reducing loneliness in recipients of community long term care services.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

PRESENTERS:

Michael Bremseth, Director of Research, Center for Social Welfare Research & Assessment

M. A. Wagaman, Center for Social Welfare Research & Assessment

Vanessa Busbee, Bureau of Long Term Care, South Carolina Department of Health and Human Services

Poster Session: No Wrong Door for Finding Community Supports
Technology

Massachusetts is addressing the persistent challenge of information access for consumers with disabilities, elders, providers and caregivers through two inter-agency, cross-age and cross disability approaches that use the ‘no wrong door’ philosophy to information and referral (I&R). MA Aging and Disabilities Information Locator (MADIL) is a web portal that employs Google technology to access existing databases. MA Aging and Disability Resources Consortium (ADRC) is a national best practice using coordinated I&R to offer public education, streamlined eligibility, intake and referral application assistance, benefits counseling, joint advocacy and problem solving.

This session will feature a demonstration of MADIL’s capabilities as well as:

- planning and technology behind this I&R innovation
- accessibility challenges and capabilities, and
- experiences coordinating across agencies and systems, including interagency agreements, firewalls, and formats.

Presenters will share ADRC’s cross-training curriculum along with:

- outcomes of a Community Transition Team helping consumers to move from nursing homes to community, and
- technological advances including an electronic consultation form, MIS upgrades and an electronic referral form to interface across independent living centers.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.

(Poster Sessions continued)

PRESENTERS:

Margaret Chow-Menzer, Assistant Commissioner, Department of Mental Retardation, Executive Office of Health and Human Services

John Chappell, Deputy Commissioner, Massachusetts Rehabilitation Commission

Robert Bass, Director, New England INDEX

Michael Oliver, Director, Massachusetts Department of Elder Affairs

Heather Johnson LaMarche, Consultant, Massachusetts Department of Elder Affairs

Poster Session: Employment Supportive Personal Assistant Services in Medicaid Programs

Approaches to Employment

To support the employment of individuals with disabilities, a number of states have developed Employment-Supportive Personal Assistant Services (EPAS), including provision of personal care needs at the workplace, transportation to the workplace, job-related activities not construed as the employer's responsibility, and job search support.

This presentation will clarify the EPAS concept and provide a cross-state comparison of eight Medicaid programs (including five under HCBS waiver funding) in terms of types of services allowed, eligibility criteria, coverage limits, needs assessment procedures and service volume. The session will share findings from focus groups, interviews with employers and state staff, and literature and policy reviews that focus on issues including:

- the distinction between EPAS and reasonable accommodations
- the specificity of allowable services among state programs
- employer concerns about health, safety and behavioral issues that come with having a PAS attendant at the worksite, and
- consumer calls for flexible use of their PAS funds.

PRESENTER:

Marsha Langer Ellison, Research Scientist, Center for Health Policy and Research



TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.

(Poster Sessions continued)

**Poster Session: “LIVING with Low Vision” or
“Hope When Vision Fails”**

Consumer Direction/Self-Determination

Vision conditions caused by macular degeneration, glaucoma and diabetic retinopathy present everyday challenges to many older adults.

This session will feature a number of resources and supports for visually impaired individuals. Demonstrations, discussions and activities will include:

- safety improvements such as those involving stairs, bathrooms and kitchens, lighting and handling of medications
- low-vision aids, such as magnifiers and CCTVs, adaptive technology and devices for daily living tasks to aid in independence
- performance by participants of simple tasks while wearing simulators of visual impairment, and
- the distribution of resource lists.

PRESENTERS:

Amy Halloran, Low Vision Specialist, AT, a Division of Perkins Products

Poster Session: Caregiving and Employment: Can You Do Both?

Caregiver Supports

The challenges of being both a caregiver and a valued worker are enormous—yet it is possible in that the goals of businesses and workers are not mutually exclusive.

This session will explore the subject of working caregivers from both the employer’s and the caregiver’s perspectives.

Highlights will include:

- statistics on current working caregivers in America
- the financial effect on both the employer and the caregiver
- the effect on the current health of our workforce
- basic tools for business managers to support caregivers, and
- tools to allow working caregivers to evaluate their situation, expand their support networks and learn about available resources.

PRESENTERS:

Sheryl Leary, Family Caregiver Specialist, HESSCO Elder Services

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

Poster Session: Savings from Rebalancing: Reality or Myth? *Systems Change*

State Rebalancing Initiatives are intended to accomplish the best of all worlds: to increase the availability of home and community based services (HCBS), allowing people to remain in or move back to community settings as long as possible, and to save money by decreasing use of more expensive, institutional options such as nursing facilities and ICFs/MR.

This session will explore whether rebalancing has accomplished its intended purpose, based on the experiences of selected states. Specifically, presenters will examine:

- methodologies used to estimate savings from rebalancing
- whether savings have actually been achieved
- whether savings have been reinvested to increase the availability of HCBS, and
- unexpected costs associated with rebalancing.

PRESENTERS:

Arthur Lerman, Senior Consultant, Public Consulting Group, Inc.
Les C. Hendrickson, Ph.D., Visiting Professor, Rutgers Center for State Health Policy

Poster Session: Using Websites for Consumer-Directed Services: The Georgia TPA Web Portal *Technology*

A premier example of the increasing use of web applications to enhance the delivery of consumer directed services is the development of Public Partnerships to develop a Third Party Administrator (TPA) program in Georgia for children and adolescents with severe emotional disturbance and/or substance abuse disorders.

In this session, speakers will discuss how a website and information system were designed and implemented to meet the goals of the TPA program. The session will include:

- the benefits of web based technology
- a live demonstration of the website
- statistics on web site usage and trends, and
- overall lessons learned.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

PRESENTERS:

Jack Liu, Chief Information Officer, Public Partnership, LLC
Stacey Sereno, Assistant Program Manager, Public Partnerships, LLC

Poster Session: Consumer Direction and Home Care: Paid Family Caregiving from a Consumer Perspective

Consumer Direction/Self-Determination

While paying family members is a controversial approach to providing quality care, it is seen as one method to increase satisfaction, relieve stress and empower families.

This workshop will present findings of a study being conducted with South Carolina's Community Long Term Care program that identifies, from the point of view of care recipients, factors influencing satisfaction in home and community based programs in which family member are paid to provide personal care services. Factors to be explored include:

- age, gender, spirituality, motivations, stressors and stress relievers, level of dependency, financial resources, and general life satisfaction of care recipients
- their relationships to caregivers, household composition, reciprocity and social isolation, and
- employment issues such as supervision, accountability and quality control.

PRESENTERS:

Sue Lyman, Associate Professor, Winthrop University, Department of Social Work

Alex Wagaman, Director of Operations, CSWRA, Winthrop University, Department of Social Work

Vanessa Busbee, Program Coordinator, South Carolina Department of Health and Human Services—Community Long Term Care

Hallie Farmer, Graduate Research Assistant, CSWRA, Winthrop University, Department of Social Work



TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

Poster Session: Gaining An Understanding About Residents in Independent Living Facilities

Housing

Independent Living (IL) facilities have not received nearly the attention paid to Assisted Living facilities in research over the last two decades. To address this gap, MGH Institute of Health Professions explored the safety and well-being concerns of elderly residents living in three ILFs in Massachusetts as well as their respective family members and staff servicing these facilities.

This session will review the findings of eight sets of qualitative focus group interviews including staff/clinicians, residents' families, including:

- similarities and differences in the concerns shared by various participants
- the resulting model of Connected Disconnections portraying sources of agreements and tensions in groups' views and aspirations, and
- practical recommendations to improve entrance procedures, new resident transitions and oversight for physical and cognitively impaired residents.

PRESENTERS:

Diane Mahoney, Director of Gerontechnology & Mohr Research
Professor, MGH Institute of Health Professions

Edward Mahoney, Project Director, MGH Institute of Health Professions

Poster Session: Tailoring Sensor Technology to Memory Impaired Residents in Independent Living Facilities

Technology

Evidence is mounting that vulnerable elders, including those with memory impairment, are moving into Independent Living (IL) facilities that do not have the type of staff or range of supportive services found in assisted living. To address this concern, elderly residents, their relatives, building managers and affiliated nurse practitioners have participated in an Alzheimer's Foundation sponsored project using remote technology to monitor residents' status.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.

(Poster Sessions continued)

This session will feature highlights of the projects and its findings including:

- critical concerns, such as management of medications, meals and shutting off water
- the functionality of the remote home monitoring system, which tailors the type of sensor and activities monitored and triages alert information to multiple parties authorized as recipients and
- keys to acceptance of the system.

PRESENTERS:

Edward Mahoney, Project Director, MGH Institute of Health Professions

Diane Mahoney, Gerontechnology Director, MGH Institute of Health Professions

Poster Session: The Road Not Taken—Medicaid Assisted Living in Public Housing

Housing

The Assisted Living Waiver Pilot Project (ALWPP), California's test of the efficacy of assisted living as a Medicaid benefit, is two years old and in the waiver renewal process. The project currently serves more than 600 in 37 settings, including public housing.

This session will summarize the findings and experiences of the project, including:

- the essential differences between assisted living facility and PSH models of delivery, and the unique opportunities and needs of the setting
- the intent and purpose of the ALWPP design
- details of the PSH challenges, such as the reimbursement schemata, and successes, and
- a discussion of the CA model vis-a-vis other states

PRESENTERS:

Mark Mimnaugh, Nurse Consultant III, California Department of Health Services

Bernard Finneran, Health Program Specialist I, California Department of Health Services

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

Poster Session: SeniorPalooza: The Ideal Opportunity for Promoting Aging In Place and Elder Care Services
Supports for Community Living

Almost every public event is a branding opportunity that offers the chance to send a message about who your organization is and the benefits it can deliver.

This session will describe how SeniorPalooza, a planned series of events hosted by Ethos, local businesses, organizations and elected officials for the elderly and their support circles, has helped the Massachusetts home and community based care agency create a distinctive, clear identity that furthers its mission. The workshop will focus on the benefits of SeniorPalooza as an alternative to advertising, including:

- enhanced quality of life and encouragement of independence for elders
- ready made socialization opportunities for elders and their support circles
- heightened visibility for the agency, community partners, and the host community
- increased awareness of services and the need for communities to be age-friendly
- strengthened relationships in the community resulting in future collaborative efforts, and
- increased referrals/inquiries over the long term.

PRESENTERS:

Linda Monteiro, Community Relations Director, Ethos

Poster Session: Medicaid Long Term Care Home and Community Based Services: Trends in Programs and Policies, 1999-2005
Consumer Direction/Self-Determination

With 43 states reporting budget deficits in 2003, the Deficit Reduction Act (2005) reflects growing concern about Medicaid HCBS and the need for information on program and policy trends. By 2005, the Medicaid program paid for 40 percent of the nation's estimated \$160 billion total long term care (LTC) expenditures, with institutional care (e.g., nursing homes) consuming 60 percent of those expenditures.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

This session will present the findings of a paper that draws from a unique national dataset to present the latest trends in participants, expenditures and policies for the three Medicaid HCBS programs—home health, state plan personal care services (PCS), and 1915(c) waivers—in response to consumer demand and the Supreme Court decision in the *Olmstead* case. Data to be discussed includes:

- growth rates in HCBS participants and expenditures
- increases in waiting lists for waiver services even as the number of available ‘slots’ increases, and
- use of cost caps such as service and cost limits used in almost half the state plan personal care programs and almost a third of home health programs.

PRESENTERS:

Terence Ng, Research Analyst, University of California
San Francisco

Poster Session: What Impact Does Ability to Purchase Goods and Services Have on Participants in Cash & Counseling programs?

Consumer Direction/Self-Determination

A key feature of the Cash & Counseling (C&C) model is participants’ ability to use their flexible spending plans to purchase goods and services in addition to human assistance. This session will present the findings of a qualitative study that examined the added benefit of purchasing goods and services and its positive implications for future policy development of home and community based care. Highlights of the session will include:

- data sources used and state programs examined in the study
- findings regarding the extent of participants’ spending and positive gains from purchases of goods and services, such as increased comfort, safety, mobility, ability to perform tasks and independence, and
- information on cost savings that occurred for some participants.

PRESENTERS:

Julie Norstrand, Master of Science, Boston College
Kevin Mahoney, PhD, Boston College

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

Poster Session: West Virginia's Self-Directed Supports and Services Program

Consumer Direction/Self-Determination

APS Healthcare and West Virginia have developed a self-directed services and supports model for approximately 4000 residents in the MR/DD waiver program. This session will describe the program's development and its statistics driven budget model; fully electronic, real-time information tracking system; and assessment tool used in the primary setting of the recipient. Presenters will also discuss:

- the flexibility required to tailor a program for a specific state
- training and education of stakeholders, and
- the data driven methodology behind deriving an equitable mechanism for distributing resources.

PRESENTERS:

Scott Orme, Manager of Consulting Services, APS Healthcare
Randall Hill, Waiver Director, APS Healthcare

Poster Session: Enacting Support Brokerage in the Twelve Cash & Counseling Expansion States

Consumer Direction/Self-Determination

A recent study by the Cash & Counseling National Program Office (NPO) has illuminated best practices and future directions of states in operationalizing the support-broker role in self-directed service models as outlined in the Cash & Counseling Vision Statement. This session will review the study's methodology and issues including:

- positions identified by states to provide information and assistance in support of participant-direction
- educational and training requirements, and
- whether these positions are fulfilling states' expectations.

PRESENTERS:

Jennifer Randall, PhD Student/Project Director, Cash & Counseling National Program Office
Venera Bektashi, MSW/PhD Student, Cash & Counseling NPO
Suzanne Crisp, Senior Research Leader/State Liaison Mentor, Thomson Healthcare
David Horvath, Senior Consultant/Program Manager, Public Partnerships LLC

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.

(Poster Sessions continued)

Poster Session: Live and Learn: An Innovative Early Stage Program

Consumer Direction/Self-Determination

Rhode Island's Live and Learn program improves quality of life by teaching persons diagnosed with early memory loss due to disease, including Alzheimer's, to compensate through memory enhancement activities, physical and mental stimulation, social interaction and just plain fun! This session will review the program's first year, including:

- benefits for family members/care partners
- outreach efforts
- activities appropriate for this type of program, and
- implementation challenges.

PRESENTERS:

Rita St. Pierre, Program Director, Alzheimer's Association
RI Chapter

Poster Session: The Impact of State Attributes on Personal Assistance Service Use

Systems Change

Given the impending demographic wave of aging persons, it is critical to grapple with issues surrounding access to and funding of care. A quantitative, cross-sectional study using secondary data from the 1999 National Long-Term Care Study shows interstate variations in HCBS funding leading to different patterns of utilization of personal assistance services (PAS).

This session will present findings from this investigation of factors influencing individual-level use of PAS. Discussion will focus on:

- interstate variations in Medicaid HCBS resources, and
- other macro-level state policies affecting the generosity of PAS funding.

PRESENTERS:

Jennifer Sullivan, Research Health Scientist, VA Boston
Healthcare System

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

Poster Session: Elder Mediation: A Valuable Resource for Resolving Disputes Involving Elders and their Families

Caregiver Supports

Mediation can be a useful process to help high conflict families create workable and safe solutions to their disputes around eldercare issues including finances, living arrangements, medical care and family relations. This interactive workshop will introduce the basics of mediation and facilitation techniques and highlight:

- how to identify families who would benefit from mediation
- how Case Managers can participate in the mediation process as a resource and/or advocate, and
- tips for managing conflict in their own work (and personal lives).

PRESENTERS:

Blair Trippe, Principal, Elder Decisions

Crystal Thorpe, Principal, Elder Decisions

Poster Session: HCBS.org—The Clearinghouse for Home and Community-Based Services

Systems Change

The HCBS.org Clearinghouse is designed to facilitate the sharing of information, tools and resources. This poster session will feature a live demonstration of the website, highlight recent modifications and offer suggestions for locating information most relevant to program developers, policy makers, researchers, funding organizations, advocacy groups, and others engaged in systems change. The session will offer a hands-on opportunity to learn about:

- types of documents and resources available for review
- browsing documents by facets and filtering, sorting, simplifying or expanding search results
- connecting to best practices and the latest developments
- contributing documents and resources, and
- personalization with features such as Forward to a Friend and myLIBRARY

PRESENTERS:

Brenda Vitale, Associate Project Director, hcbs.org Clearinghouse

Buddy Rutzke, Information & Program Specialist, hcbs.org Clearinghouse

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

**Poster Session: Participation in Senior Center Activities:
A Prospectus on Targeting Patrons by SES and Related Factors**
Supports for Community Living

While a wealth of research supports the positive role of multipurpose senior centers in successful aging, more frequent users of these centers tend to be the “old-old” and those with lower income and education. This session is intended to inspire a dialogue on reconceiving centers as wellness centers with more comprehensive programming targeted to a wider range of patrons. The presentation will include best practices from the Mattapoissett Social and Wellness Center on how the young-old many benefit from:

- opportunities for community involvement
- a sense of generativity and civic engagement and,
- even opportunities for development of new careers.

PRESENTER:

Vanessa M.F. Williams, Executive Director, Mattapoissett Council on Aging

**Poster Session: The Public Authority: A Tool for Implementing
Consumer Directed Care**

Consumer Direction/Self-Determination

Public Authorities have been designed to help consumers with significant disabilities remain in the community. This session will highlight innovations in California’s In-Home Supportive Services (IHSS) programs, the nation’s largest, and the Personal Assistance Services Council (PASC) of Los Angeles, one of its largest consumer directed community based long term care programs, including:

- the positive impact on retention of health benefits for workers
- the development and operation of a Back-Up Program that provides consumers with short notice replacement workers, and
- worker registry tools such as a tool that tracks currently available workers.

PRESENTERS:

Rick Zawadski, President, RTZ Associates

Ron Osterhout, Executive Director, Personal Assistance Service Council of Los Angeles

Laura Wall, Senior Associate, RTZ Associates

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

12:45 p.m. – 2:15 p.m.
(Poster Sessions continued)

Poster Session: Preliminary Findings from Guam's Person Centered Planning Project

Consumer Direction/Self-Determination

Guam was one of a small number of states awarded a Person-Centered Planning (PCP) grant from the Centers for Medicare and Medicaid Services (CMS), requiring systems and capacities to change the focus of care planning from the agency rules and processes of agencies to consumers' desires, needs and abilities. This session will discuss how the program's collaborative care planning tools, which build on the formal supports of Guam's existing ADRC, empower consumers and increase community options. The poster will:

- walk through the consumer experience from first contact to ongoing use
- present data sharing policies and responsibilities, and
- lay out challenges and future plans for the Guam model.

PRESENTER:

Mike Zawadski, Senior Project Manager, RTZ Associates

Poster Session: JEVS Support for Independence-Consumer Directed Training Series

Consumer Direction/Self-Determination

The *Consumer Directed Training Series* is a cutting edge training program and one of the first of its kind in the State of Pennsylvania. Based on the consumer directed model, which means the consumer manages and directs their care according to their personal preferences and needs. The series is designed for self paced/self directed learning. There are sessions that target numerous learning objectives to enhance the relationship between the consumer and attendant including hiring, effective communication, recognizing and reporting abuse and neglect, basic care services, respecting cultures.

PRESENTERS:

Erinn Rinn, JEVS Supports for Independence

Dina Sanz, JEVS Supports for Independence

1:00 p.m. – 5:00 p.m.

Nursing Home Diversion Grantee Meeting—Douglas Room

Convened by the U.S. Administration on Aging
(AoA Grantee Event by Invitation)

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

1:30 p.m. – 5:30 p.m.

Mobile Learning Laboratory

Off Site Visit with Fee, Pre-registration Required, Limited Space Availability

Join us for an exciting excursion to two of Boston's most unique and innovative attractions, the Massachusetts Institute of Technology's *AgeLab* and Adaptive Environments' *Institute on Human-Centered Design*. Joe Coughlin will host three revolving breakouts at MIT's AgeLab, including a virtual experience main lab visit, a health technology session to explore the nuances of technology for individuals living in the community and a trip to the navigation studio where you will observe and experience with how older adults search the internet for services. Next, Valerie Fletcher will unveil the Institute on Human Centered Design's model for an inclusive environment. Participants will also see and experience international state of the art exhibits and products designed to expand opportunity and experiences for people of all ages and abilities.

SCHEDULE:

1:30 p.m.

Participants Board Bus

Westin Boston Waterfront Hotel
(Front of the Hotel)

2:15 p.m. – 3:30 p.m.

MIT AgeLab Site Visit

3:45 p.m. – 5:00 p.m.

**Adaptive Environment/Institute on
Human-Centered Design Site Visit**

5:15 p.m. – 5:30 p.m.

Participants Return to

Westin Boston Waterfront Hotel

About the Mobile Learning Lab Sites:

The *MIT AgeLab* was created in 1999 to invent new ideas and creatively translate technologies into practical solutions that improve people's health and enable them to "do things" throughout the lifespan. Based within the MIT School of Engineering's Systems Division, the AgeLab combines a multi-disciplinary and global team of researchers, business partners, universities, and the aging community to design, develop and deploy innovations to improve quality of life.

Institute for Human Centered Design (IHCD) is a 30 year old international non-profit organization, based in Boston, committed to advancing the role of design in expanding opportunity and enhancing experience for people of all ages and abilities. IHCD's work balances expertise in legally required accessibility with promotion of best practices in human-centered and universal design.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

2:00 p.m. – 5:00 p.m.

Intensives

Pre-registration with Fee

Becoming a Person Centered System—Adams

In October 2007, a learning community was formed to build sustainable infrastructures toward becoming a person centered system. Funded through a CMS Real Choice System Change grant, this multi-state collaborative is designed to assist six state developmental disability agencies to incorporate in breadth and depth person centered thinking and practices. Attendees will learn how this community of practice is working to re-engineer state systems through three distinct levels of change. Supports that achieve the desired outcomes for people require that all parts of the system work together effectively and efficiently. Level one change occurs when direct support staff changes their day to day behavior and practices that impact the person's life. Level two changes occur at the organizational level in policy, processes, rules and infrastructure that lead back to practices that impact the person's life. Level three changes require the involvement of leaders from State Administrative Agencies to approve and implement system-wide changes to embed person centered practices into the larger system's infrastructure. The presentation will be didactic in nature, with time allotted for audience questions and answers, and open discussion. Attendees will receive a variety of materials used in the learning community of practice.

PRESENTERS:

Rie Kennedy-Lizotte, Program Manager, National Association of State Directors of Developmental Disabilities Services
Michael Smull, Director, Support Development Associates, Inc.
MaryLou Bourne, Associate, Support Development Associates, Inc.

Developing a Quality and Performance Measurement Strategy for HCBS Programs—Faneuil

As more people are served at home and in the community, Medicaid purchasers are seeking ways to develop and enhance their quality and measurement strategies for HCBS programs. This interactive intensive is designed to provide participants with: (1) guidance on crafting performance measures for the Medicaid 1915c HCBS waivers, as required in CMS' Waiver Application, version 3.5; (2) an overview of ongoing federal efforts to develop HCBS performance measures; and (3) practical strategies used by states and health plans in developing measurement strategies for complex populations.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

2:00 p.m. – 5:00 p.m.

(Continued)

PRESENTERS:

Karen Llanos, Senior Program Officer, Center for Health Care Strategies

Anita Yuskauskas, Technical Director, Centers for Medicare & Medicaid Services

Beth Jackson, Director, Thomson Healthcare

Cathy Stocksdales, Manager of Quality Improvement from Ohio Department of Aging

D.E.B. Potter, Sr. Survey Statistician, Agency for Healthcare Research and Quality

Alice Lind, Associate Vice President, Center for Health Care Strategies

Christopher Duff, President/CEO of AXIS Healthcare, Minnesota

2:15 p.m. – 3:45 p.m.

Workshops

Transportation: An Essential Support for Community Living

Alcott

Track: Transportation

Without adequate transportation services, older people living in the community can become isolated and elders with long term care needs may be at greater risk of institutional placement. This workshop will explore the intersection between transportation and long term care and offer concrete examples of creative community based transportation services designed to meet a range of mobility needs. The workshop will include information about the National Center on Senior Transportation (NCST), which recently funded eight community organizations to demonstrate innovative approaches for providing senior transportation services.

The session will highlight the varied funding sources used by community agencies to support transportation services for older people as well as a range of options including:

- volunteer driver programs
- fixed route public transit and paratransit services
- mobility assessment and counseling to support elders and caregivers in identifying transportation options that best meet their individual needs.

PRESENTERS:

Virginia Dize, Assistant Director, National Center on Senior Transportation, National Association of Area Agencies on Aging

Mike Killoran, Deputy Commissioner for Transportation, Boston Commission on Affairs of the Elderly

Lynn Shelton, Chore Connection Director, Mid County Senior Services

Lesa Sulimay, Executive Director, Mid County Senior Services

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

2:15 p.m. – 3:45 p.m.

(Continued)



Managed Long Term Care, Part 2: Challenges to Operationalizing a Managed Long Term Care Program

Commonwealth A-B

Track: CMS Workshop Series

A small number of states now have sizeable managed long term care programs. This session will draw on the expertise of leading states and CMS to identify operational changes that are needed to make the transition from running a traditional Long Term Care program and purchasing long term care through managed care organizations.

PRESENTERS:

Brian Burwell, Vice President, Chronic Care and Disability, Thomson Reuters

Paul Saucier, Muskie School, U. of Southern Maine

Monica Deignan, Managed Care Section Chief, Office of Family Care Expansion, Wisconsin Department of Health Services

Pamela Coleman, Director of Managed Care Operations, Texas Health and Human Service Commission

Larry Heyeck, Deputy Director, Medical Assistance Division, New Mexico

Diane Flanders, Director of Coordinated Care Systems, MassHealth Office of Long Term Care

Suzanne Bosstick, Director, Division of Community & Institutional Services, Disabled and Elderly Health Programs Group, CMS

The Elder Justice Act and its Relationship to Home and Community Based Services

Commonwealth C

Track: Consumer Direction/Self Determination

The proposed Elder Justice Act is designed to create mechanisms to reduce crimes against vulnerable elderly individuals, as well as to protect them from fraud and abuse in long term care situations. This session will provide an overview of the Act and its current status in Congress, as well as information on how this legislation can and will relate to Home and Community Based Services. The session will also include basic tips for advocacy and what participants can do both to advance the Elder Justice Act and benefit their own organizations.

PRESENTER:

Bob Blancato, President, Matz, Blancato & Associates, Inc.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

2:15 p.m. – 3:45 p.m.

(Continued)

Project 2020: Can Home and Community Based Services Be Expanded Without Busting the Budget?

Grand Ballroom C

Track: Administration

The National Association of State Units on Aging (NASUA) and the National Association of Area Agencies on Aging (n4a)—conscious of the financial pressures facing states and the federal government—have developed a coordinated national long term care strategy that will generate savings in Medicaid and Medicare at the federal and state levels while enabling older adults to get the support they need to successfully age where they choose. Project 2020 is a comprehensive and integrated approach to enabling older adults and persons with disabilities to make their own decisions, to take steps to manage their own health, and receive the care they choose in order to remain in their homes and communities for as long as possible, avoiding unnecessary and unwanted institutionalization. This session will also examine Medicaid trend data that suggests that states that have made the most progress in shifting the balance from institutional care to home and community based care also experienced lower rates of increase in long term care spending for older adults and younger individuals with physical disabilities.

PRESENTERS:

Martha A. Roherty, Executive Director, National Association of State Units on Aging

Sandy Markwood, CEO, National Association of Area Agencies on Aging

Lisa Alecxih, Vice President, The Lewin Group

Consumer Needs Assessment: Tools to Assist in Self Assessment and Quality Provider Selection

Grand Ballroom E

Track: Administration

This session will describe self assessment tools developed for unique populations—older adults, adults with disabilities, families with children with special needs, and youth transitioning to adult services. The session will display an automated process which relies on user friendly language to match available resources with needs identified by the consumer. The session also features another function which supports informed consumers through a provider rating system where consumers numerically rate providers on reliability and quality with results converted to data used by other consumers to select quality providers.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

2:15 p.m. – 3:45 p.m.

(Continued)

PRESENTERS:

Charlie Lewis, Administrator, University of Nebraska Center for Children, Families and the Law, Answers4Families

MaryJo Iwan, Consultant, National Association for State Units on Aging

Connection Technology: Getting Everyone Connected is Key to Successful Self Direction Waiver Programs

Hancock

Track: Technology

Two of the most important advancements in quality care are person centered planning—which has engaged providers in the struggle to support independence while managing risks in an elusive interplay of choice and responsibility—and self directed services, the documented benefits of which include increased personal satisfaction, support authenticity, and decreased cost on the delivery side. But do states and agencies have the tools to effectively manage on the administrative side? How do they get on the same side as those who need support? This presentation will address these questions by acquainting participants with a technology framework for connecting all parties with essential processes and information needed to support each unique role in the “Circle of Support,” including Participants, Care Providers, Financial Management Services, Care Coordinators/Brokers, and State Program Administrators.

Presenters will discuss an online hosted data system that is:

- already in operation supporting HCBS waiver programs
- configurable to unique waiver program and reporting requirements
- secure yet fully accessible and
- affordable.

PRESENTERS:

Scott Pelham, Consulting Services Director, Greystone Consumer Empowerment Systems

Jessica Whitney, Customer Services Director, Greystone Consumer Empowerment Systems

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

2:15 p.m. – 3:45 p.m.

(Continued)

Bridging the Gap for Older Adults: State and National Initiatives for Care Coordination

Otis

Track: Supports for Community Living

An informative discussion on how care coordination can effectively bring together health and home and community based services to support older adults in their desire to maintain optimal health and reside within the community.

PRESENTERS:

John Cochran, Assistant Director, Intergovernmental Affairs and Strategic Planning, New York State Office for Aging

Jeannine Melly MPH, Deputy Director, Social Work Leadership Institute at the New York Academy of Medicine

Carin Tinney LMSW, Associate Program Officer, Social Work Leadership Institute at the New York Academy of Medicine

When a Case Manager Wears More Than One Hat: Practical Tools for Identifying and Addressing a Conflict of Interest

Stone

Track: Quality

In many states, a case management agency is also the agency providing home and community based services. When does wearing more than one hat create a conflict of interest that undermines the quality of service? This session will review where a case manager's "public duty" and "private interest" can come into conflict in determining where and when to offer HCBS and how those conflicts potentially play out. Participants will also consider safeguards and structural designs that states might consider for remedying this inherent conflict.

PRESENTERS:

Maureen Booth, Director of Managed Care Initiatives, Muskie School, Health Policy Institute

Eileen Griffin, Research Associate, Muskie School of Public Service, University of Southern Maine

Matthew Solano, Director of Program Quality, Division for Developmental Disabilities, Colorado Department of Human Services

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

2:15 p.m. – 3:45 p.m.
(Continued)

State Funded HCBS Programs for Older People: Findings and Trends

Webster

Track: Systems Change

While Medicaid remains the primary source of financing for home and community-based services (HCBS), many states continue to use their own funds to provide these services. This session will highlight the findings from AARP's third survey of state funded HCBS programs that serve older people (previous studies were published in 1997 and 2004). Changes in funding, number of programs, participants served and services offered will be highlighted.

PRESENTERS:

Enid Kassner, Director, Independent Living/LTC, AARP

Robert Mollica, Senior Program Director, National Academy for State Health Policy

Carol Sala, Administrator, Nevada Division for Aging Services

Mike Luckovich, Consumer Direction Specialist, Pennsylvania Office of Long Term Care

Children's Program for All-inclusive Care (CHIPACC): Using Medicaid Authorities to Serve Children with Life-threatening Illnesses

Grand D

Systems Change

The session will describe this innovative support program for children with life-threatening illnesses that integrates health and social supports, and describe how states can use the 1915(c) and 1915(b) waiver authorities to implement this model. CMS and Children's Hospice International have worked closely together for several years to determine how Medicaid can support this innovative support program. Several states have successfully implemented the model. The session will describe the model's distinguishing features and state's efforts to implement them. CHI PACC is broader than traditional hospice/palliative care models. A CHI PACC® program provides a continuum of care for children and their families from time of diagnosis, with hope for a cure, and through bereavement if a cure is not attained. CHI PACC provides care in the most appropriate setting based on family choice.

PRESENTERS:

Ann Armstrong-Dailey, Founding Director, CEO, Children's Hospice International

Mary Sowers, Technical Director for HCBS, Centers for Medicare & Medicaid Services

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

4:00 p.m. – 5:30 p.m.

Workshops

Public Private Partnerships Can Serve as Models to Help Seniors Live Independently

Alcott

Track: Supports for Community Living

In 2004, Evercare introduced *Senior Care Options* in Massachusetts, an integrated program that provides all Medicare, Medicaid and Medicare Part D benefits, as well as extra services. The plan is seen as a national model for geriatric care, helping seniors live independently. Evercare Senior Care Options has been successful in delaying nursing facility placement while achieving high satisfaction ratings among its more than 2,000 participants. Presenters will discuss how Evercare's community based programs, including *Senior Care Options*, have improved health, lowered costs and enhanced well being for thousands of at-risk adults.

The workshop will also focus on Evercare community based programs in other states including:

- participation in the Florida Nursing Home Diversion Project that helped reduce nursing home placements by 70 percent
- an Arizona program that empowered 60 percent of the state's elderly and disabled residents to avoid nursing homes
- the STAR+PLUS program that helped save the State of Texas approximately 123 million dollars in Harris County.

PRESENTERS:

Nancy Olikier, Director, Public Affairs & Community Relations, UnitedHealth Group

Richard Segan, Executive Director, Evercare

CMS Open Microphone Session

Commonwealth A-B

Track: CMS Workshop Series

Here's the opportunity states and agencies have been waiting for: an open dialogue with the Centers for Medicare and Medicaid Services (CMS) where participants can raise their toughest issues and concerns for discussion and clarification. CMS will also use this session to provide the audience with updates on regulations that impact home and community based services.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

4:00 p.m. – 5:30 p.m.
(Continued)

PRESENTERS:

Suzanne Bosstick, Director, Division of Community and Institutional Services, Disabled and Elderly Health Programs Group, CMSO, CMS

Anita Yuskas, Technical Director for Quality, Disabled and Elderly Health Programs Group, CMSO, CMS

Dan Timmel, Health Insurance Specialist, Disabled and Elderly Health Programs Group, CMSO, CMS

Regional Office Staff, Disabled and Elderly Health Programs Group, CMSO, CMS

New Directions: State by State Results from Annual Aging Network Assessment

Commonwealth C

Track: Systems Change

Current initiatives from the U.S. Administration on Aging are expanding the long term care role of State Units on Aging (SUAs), Area Agencies on Aging (AAAs), and tribal organizations (Title VI). In particular, there is increasing focus on the development of streamlined, consumer directed long term care options to help older people live in their communities with maximum choice, control, and independence. In this workshop, participants will receive an overview of federal initiatives for the aging network, and will learn about a multi-faceted project—a partnership between the National Association of Area Agencies on Aging (n4a) and a university based research organization—designed to provide information and technical assistance to the aging network.

The session will present:

- findings of an annual assessment, undertaken as part of the project, of the involvement of all AAAs and Title VI organizations in community partnerships and programs related to federal initiatives for modernizing the long term care system
- aggregated data from states representing a variety of geographic areas and organizational structures within the aging network covering degree of involvement in key programs and activities such as consumer direction, Aging and Disability Resource Center networks, strategic community partnerships, and leveraging multiple funding sources.

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

4:00 p.m. – 5:30 p.m.

(Continued)

PRESENTERS:

Suzanne Kunkel, Director, Scripps Gerontology Center
Sandy Markwood, CEO, National Association of Area Agencies on Aging
Robert Logan, Supervisory Aging Services Specialist, U.S. Administration on Aging
Abbe Linscott Lackmeyer, Research Associate, Scripps Gerontology Center

Cash and Counseling: Moving Beyond the Demonstration and Replication

Grand Ballroom C

Track: Consumer Direction/Self Determination

Cash and Counseling (C&C), launched in 1998 as a three-state demonstration project to offer frail elders and adults with disabilities the option to decide for themselves what mix of goods and services will best meet their personal care needs within a flexible budget, was expanded in a replication project involving 12 states.

This workshop will provide an update on the replication states and present next steps in providing research and technical assistance to states interested in developing this consumer directed service model.

Specifically, the session will cover:

- new evaluation findings from the four year replication project focusing on specific state challenges, including those related to outreach and education, key stakeholder resistance, counseling and financial management services, developing individual budgets, and enrollment
- approaches from three replication states on how to address the challenges identified in the data
- plans to develop a Self Direction/Cash and Counseling Research & Technical Assistance Center to offer on-going assistance to states in various stages of designing and implementing cash option programs in 1) making delivery systems more consumer directed 2) implementing the C&C model in new jurisdictions and 3) growing and sustaining C&C where the model already exists.

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4:00 p.m. – 5:30 p.m.
(Continued)

PRESENTERS:

Lori Simon-Rusinowitz, Research Director, Cash and Counseling,
University of Maryland, Department of Health Services
Administration

Kevin J. Mahoney, Director, Cash & Counseling National
Program Office, Boston College

Irene Collins, Commissioner, Alabama Department of Senior
Services

Janet O’Keeffe, Senior Researcher, Research Triangle Institute

Community Transportation and Medical Transportation: Lifelines for Aging in Place

Grand Ballroom D

Track: Transportation

Livable communities with diverse mobility options are essential components of successful aging in place, and lack of transportation is recognized as one of the largest barriers to the provision of community-based health care. This workshop will explore how communities can provide senior friendly transportation for active older adults who want to remain engaged in community life and work past age 65, as well as for medically fragile older adults who desire to continue to live independently.

Specifically, the session will:

- offer examples of communities with effective senior transportation, and
- explore how State Units on Aging, working with two national providers of technical assistance—the Community Transportation Association and the National Center for Senior Transportation—can assist communities in planning and implementing senior transportation.

PRESENTERS:

Jane Hardin, Coordinator, Senior Transportation Programs,
Community Transportation Association of America

Valerie Miller, Medical Transportation Specialist, Community
Transportation Association of America

Virginia Dize, Assistant Director, National Center on Senior
Transportation, National Association of Area Agencies on Aging

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

4:00 p.m. – 5:30 p.m.

(Continued)

**Assuring Quality in the Money Follows the Person Program:
Notable Practices and Lessons Learned from State Experience**

Grand Ballroom E

Track: Quality

The CMS Money Follows the Person (MFP) grant program is designed to help individuals with disabilities return to the community from institutional settings. This session will explore state challenges faced in satisfying quality management and improvement expectations, innovative strategies for doing so, and the implication for other HCBS programs.

Particular focus will be given to requirements related to:

- 24-hour system-level back up for essential services
- critical incident systems, and
- risk management strategies.

PRESENTER:

Sara Galantowicz, Senior Research Leader, Thomson Healthcare Inc.

**Launching Children's Waiver Programs: Two States' Approaches to
Serving Children with Autism and Other Disabilities**

Otis

Track: Administration

States are increasingly examining innovations to serve children with long term support needs in ways that allow them to remain in their homes and actively participate in their families and communities, while increasing the efficiency of service delivery and reducing duplication. In this presentation, the Massachusetts Department of Mental Retardation (DPM) and Public Partnerships (PPL) and the Wisconsin Department of Health Services will present overviews of their initiatives for children with autism and other disabilities.

The presentations will include:

- initial findings and program expectations for Massachusetts' Autism Waiver, launched in 2008 to provide one-to-one behavioral, social and communication based interventions through a service called Expanded Habilitation, Education, as well as a web portal to credential providers and create a resource directory for all stakeholders.
- a review of Wisconsin's Children's Long Term Support Home and Community Based Medicaid Waivers (CLTS), which includes Intensive In-Home Treatment Services for children with an Autism Spectrum Disorder and is designed to increase local decision making, reduce fragmented funding, maintain

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

4:00 p.m. – 5:30 p.m.
(Continued)

consistent eligibility criteria, assure statewide consistency within a county waiver agent system, reduce service gaps, and eliminate waiting lists for CLTS.

PRESENTERS:

Katie Sepnieski, Programs and Policy Analyst, Wisconsin Department of Health and Family Services

Julie Bryda, Programs and Policy Analyst, Wisconsin Department of Health and Family Services

Collaborating to Create Workforce Solutions

Stone

Track: Employment

A critical need for the eldercare and disability networks is reliable, well-trained staff. Studies have found that the eldercare industry alone needs to recruit up to 200,000 workers a year to keep pace with growing demand. This session will showcase how non-profits, state agencies and state universities can partner to create training and employment opportunities that can not only meet growing staffing requirements but also fulfill the voc/rehab networks' demand for meaningful opportunities where their consumers can experience successes, as well as provide for career growth and retention among direct service providers.

The workshop will focus on two such partnerships:

- the development and ongoing success of an alliance between a local area agency on aging, Springwell, Inc., and its partner the Autism Services Association, and
- Oklahoma's experience building a successful collaboration between state agencies and a state university to provide free training to individuals to become a Certified Nurse Aide or a Personal Care Assistant to meet the needs of their 1915 waiver consumers.

PRESENTERS:

Kathleen Siemionko, Director of Community Planning and Development, Springwell, Inc.

Kellie Prince, Director of Nutrition Services, Springwell, Inc.

Joel Smith, Executive Director, Autism Services Association

Ivor Holt, Director of Quality Initiatives, Oklahoma Health Care Authority

LaQueda Viewins, Program Coordinator, Oklahoma Health Care Authority

TUESDAY, SEPTEMBER 30, 2008 CONTINUED

4:00 p.m. – 5:30 p.m.

(Continued)

Development of Evidence Based and Recovery Oriented Service Initiatives by the Real Choice Mental Health Systems Transformation Grantees

Webster

Track: Systems Change

In Fiscal Year 2004, CMS provided funding for Mental Health Systems Transformation (MHST) grants under the Systems Change Grants Program. Twelve states received grants—to improve their ability to offer evidence based and recovery oriented services to individuals with serious mental illnesses. This presentation will focus on these grantees' experiences developing and implementing various initiatives including peer supports, self-direction, Assertive Community Treatment (ACT), supported employment, family psycho-education, illness management and recovery, and integrated mental health and substance abuse treatment. Participants will learn about how MHST design elements varied across states, challenges faced in these initiatives and how they were addressed, and enduring systems changes.

The presentation will highlight the operational and policy issues states should consider when redesigning state mental health systems, such as:

- identification of system barriers
- choice of evidenced based initiatives
- partnership and infrastructure development
- identification of target population(s)
- consumer involvement
- establishment of eligibility criteria
- development of training and credentialing programs
- creation of information dissemination strategies, and
- building data collection capability to monitor initiatives.

PRESENTER:

Janet O'Keeffe, Senior Researcher, Research Triangle Institute

WEDNESDAY, OCTOBER 1, 2008

7:00 a.m. – 9:30 a.m.

**Home and Community Based Services Conference Registration—
Commonwealth Foyer**

8:30 a.m. – 10:00 a.m.

Workshops

**Implementing and Refining Individual Resource Allocation
Methodologies**

Alcott

Track: Administration

State developmental disability (DD) systems have long pursued an efficient and reliable means to reimburse services provided under Medicaid home and community based services (HCBS) waivers. Rate setting for services that support people in their lives and in communities presents unique challenges. In contrast to facility based care, community based service systems have no walls and, at peak performance, interoperate with family, friends and other networks of support. A person's movement between informal and paid supports should appear seamless, while waiver service costs must be clearly delineated. Yet, while many states have explored the utility of statistical analysis and multiple regression to determine an individual resource allocation (IRA) methodology for waiver services, only a few states have successfully implemented and refined a process to meet the changing needs and expectations of DD services. This session will offer recommendations and facilitate a discussion to guide decision makers considering IRA methodologies or charged with their implementation.

PRESENTERS:

Wanda Seiler, Senior Consultant, The Rushmore Group

Jean Tuller, Consultant, Tuller Consulting

**Money Follows the Person Demonstration Initiatives:
Early Implementation Experiences**

Commonwealth A-B

Track: Systems Change

Under the federal Money Follows the Person Demonstration Program, 30 states and the District of Columbia received five-year grants to transition more than 35,000 long stay institutional residents to home and community based settings between 2007 and 2011. This session will present an overview of the program and the early implementation experiences of three state MFP programs.

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8:30 a.m. – 10:00 a.m.

(Continued)

It will feature a preliminary typology of MFP transition programs by Mathematica Policy Research (the national evaluation contractor) and presentations by MFP Project representatives from three states that began operations in late 2007 or early 2008. The Centers for Medicare and Medicaid Services' Disabled and Elderly Health Programs Group (CMS DEHPG) will discuss the MFP program's long term potential for rebalancing long term care systems.

The representatives from each state will discuss how MFP will help to rebalance their long term care system and their achievements and challenges to date, as well as describe approaches being used to:

- identify and assess transition candidates
- provide and finance transition coordination services
- make additional services available to support MFP transition participants in the community
- secure affordable, accessible housing, and
- establish systems to assure and improve care quality for MFP transition participants.

PRESENTERS:

Debra Lipson, Senior Researcher, Mathematica Policy Research

Carey Appold, Centers for Medicare and Medicaid Services,
Disabled and Elderly Health Programs Group

Lorraine Nawara, MFP Project Director, Maryland Department of
Health and Mental Hygiene

Ransey Hill, MFP Project Director, New Hampshire Department
of Health and Human Services

State Data Based Quality Management Strategies

Commonwealth C

Track: Quality

In response to federal requirements regarding the operation of home and community based waiver programs, state developmental disabilities agencies are developing new strategies for using performance and outcome data to assure, manage, and improve service quality and results. The session will provide specific examples of these various strategies.

WEDNESDAY, OCTOBER 1, 2008 CONTINUED

8:30 a.m. – 10:00 a.m.
(Continued)

Presenters will discuss quality management from two perspectives:

- states' use of standardized instruments such as the National Core Indicators to gather consumer feedback on the supports received, identify key service delivery trends, and chart individual characteristics, and
- the approaches used by two state developmental disabilities agencies in Alabama and Maine to identify, gather and utilize data to assess and manage service quality and responsiveness.

PRESENTERS:

Charles Moseley, Associate Executive Director, National Association of Directors of Developmental Disabilities Services, Inc.

Josh Engler, Policy Analyst, Human Services Research Institute

Willowdean Ash, Director of Community Programs and Waiver Services, Alabama Department of Mental Health, Division of Mental Retardation

Jane Gallivan, Director, Maine Office of Adults with Cognitive and Physical Disability Services

Improving Home and Community Based Services Waiver Resource Allocation: Cross State Examination of Efforts to Develop Reimbursement Levels and Individual Budgets Using the Supports Intensity Scale

Grand Ballroom C

Track: Systems Change

With the goal of increasing the capacity of public service systems to support people with developmental disabilities and thereby to improve individuals' quality of life, the Human Services Research Institute (HSRI) in recent years has been assisting individual states in bringing more rationality to their HCBS Waiver resource allocation processes. The starting point is the American Association on Intellectual and Developmental Disabilities (AAIDD) Supports Intensity Scale (SIS), a standardized assessment of individual support needs that offers valuable information for individual service planning, enhancing consumer direction, and provides a consistent foundation for resource allocation decisions. The session will describe HSRI's work in five states to build from the SIS to shape HCBS waiver reimbursement level systems and establish individual budget models, with application to both comprehensive waivers and support waivers. Panel members will present the state of the art in waiver resource allocation as well as common pitfalls and challenges.

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8:30 a.m. – 10:00 a.m.

(Continued)

Highlights of the session will include:

- presentation of analytic similarities and contrasts in states' population needs and reimbursement levels, with cross-state and cross waiver findings and insights enriched by specific state examples and
- a discussion of ways participants can strategically balance the demand for more equitable and effective HCBS waiver programs with the complexity of altering existing service delivery systems in a cost neutral environment.

PRESENTERS:

Jon Fortune, Policy Associate, Human Services Research Institute

John Agosta, Vice President, Human Services Research Institute

Interventions for People with Autism Spectrum Disorders

Grand Ballroom E

Track: Supports for Community Living

States are developing creative strategies to meet the needs of adults and children who have a diagnosis of Autism Spectrum Disorder (ASD). This workshop will describe lessons learned from two states with programs specifically focused on adults with ASD.

Presentations will include:

- an overview of ASD prevalence and current services
- the profile of adults with ASD served by developmental disabilities systems based on data gathered across 20 states as part of the National Core Indicators (NCI) program
- a model for behavioral support services for adults with ASD, and
- the design of new quality management strategies that will be used to monitor autism waiver services for children.

PRESENTERS:

Steve Eiken, Senior Analyst, Thomson Reuters

Janet George, Assistant Commissioner for Policy, Planning, and Children's Services, Massachusetts Department of Mental Retardation

Claire Maher Choutka, Clinical Director, Bureau of Autism Services, Pennsylvania Department of Public Welfare

Sarah Taub, Senior Policy Specialist, Human Services Research Institute

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8:30 a.m. – 10:00 a.m.
(Continued)

Advancing Understanding of the Aging Network's Role in States' Home and Community Based Services Systems

Hancock

Track: Supports for Community Living

The Aging Network's role in the delivery of home and community based services (HCBS) is at a critical juncture. Federal and state initiatives are actively pursuing the expansion of HCBS, transitioning and diverting persons from nursing homes, and incentivizing the establishment of stronger infrastructures at state and local levels to support the Network's broader role in HCBS. This session will describe the work of The Benjamin Rose Institute (BRI) with the U.S. Administration on Aging to compile a comprehensive information base that will enhance understanding of how each state provides HCBS. This information base will help establish a better understanding of how each state currently provides HCBS and identify gaps in service delivery and other areas for development, a critical first step in moving towards rebalancing long term care services. Participants will also have the opportunity to offer perspectives on BRI's work to further refine the presenters' understanding of the network's operation and implications for policy development.

In this session, the presenters will discuss:

- the goals of BRI's project
- the process by which information is being gathered from state units on aging, and
- preliminary findings from the states that have completed an online tool and participated in interviews.

PRESENTERS:

Richard Browdie, President/CEO, Benjamin Rose Institute

Linda S. Noelker, PhD, Senior Vice President, Benjamin Rose Institute

Farida K.Ejaz, PhD, Senior Research Investigator, Benjamin Rose Institute

Lisa Alecxih, Vice President, The Lewin Group

WEDNESDAY, OCTOBER 1, 2008 CONTINUED

8:30 a.m. – 10:00 a.m.
(Continued)

Collecting and Using Data for Home and Community Based Services QI

Otis

Track: Quality

This session provides practical examples of how states develop and use data to improve quality and satisfy CMS waiver assurances. The session will open with a review of the process used by Oklahoma to redesign its audit process for monitoring case management agencies under the state's HCBS waiver program for the elderly and adults with physical disabilities. Core components of that process will be discussed including the selection of review elements, sampling, scoring and follow up action. Participants also will give frank assessments on the challenges faced during the implementation of the revised process. The second half of the session will focus on the benefits and outcomes of evidence-based decisions. Using data and experience of The Council on Quality and Leadership, attendees will be shown how to synthesize and understand their own data in ways to create more effective and integrated quality management systems. While offering humorous examples from the literature on mistakes in sampling and analysis, participants will be shown how effective quality management links directly to and supports meeting the new HCBS 3.5 waiver requirements. With mini case studies and audience feedback and discussion, participants will be shown how to look at data, reframe data, and find different conclusions. Participants will be provided examples of how to present data that really grabs the attention of administrators and public officials.

PRESENTERS:

Anne Buechner, Council on Quality and Leadership

Maeleatha Patterson, Oklahoma Aging Services Division,
Department of Human Services

Billye Vincent, Oklahoma Aging Services Division,
Department of Human Services

Louise Olsen, Muskie School of Public Service

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8:30 a.m. – 10:00 a.m.
(Continued)

Preventing Disability: The Texas Demonstration to Maintain Independence and Employment

Stone

Track: Approaches to Employment

The Texas Demonstration to Maintain Independence and Employment (DMIE) is a randomized controlled trial designed to examine whether or not working people with disabling health conditions can remain independent and employed if provided health benefits and employment services. It is the largest study of its kind in the nation with more than 1600 participants. This workshop will explore the unprecedented opportunity offered by the Texas DMIE to examine issues of interest to state and national policymakers, with findings that may challenge conventional wisdom.

Issues of interest and findings to be discussed include:

- the characteristics of uninsured working people with significant health conditions (including the 20% of current Texas DMIE participants who are healthcare workers)
- factors that cause working individuals with health conditions to lose independence
- the effects of factors such as psychiatric diagnosis on behavior (including whether people with serious mental illness have the same motivation to work as people with other health conditions)
- effective strategies in enrolling individuals in health benefits plans (e.g., traditional marketing v. enrollment at point of service in health clinics), and
- the best strategies for promoting continued independence and employment and can they can be implemented.

PRESENTERS:

Dena Stoner, Senior Policy Advisor, Texas Department of State Health Services

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8:30 a.m. – 10:00 a.m.
(Continued)

Success in Indiana: The Results of Effective Public and Private Collaboration

Webster

Track: Systems Change

Cutting edge solutions are required in all aspects of human services to meet demand while ensuring quality. During 2006, the Division of Disability and Rehabilitative Services (DDRS), a branch of the Indiana Family and Social Services Administration, launched a ground breaking initiative to consolidate case-management services for all individuals with developmental disabilities participating in the HCBS Medicaid waiver program. The presenters will share how innovation and collaboration between DDRS and Indiana Professional Management Group (IPMG) have enabled Indiana to elevate consumer needs in delivering case management to more than 10,000 waiver participants. A particular focus will be the potential application of the program's business model to other populations beyond individuals with disabilities, as it addresses many of the requirements of the HCBS waiver program.

PRESENTERS:

Richard Metzger, Managing Director, Indiana Professional Management Group

Adrienne M. Shields, Deputy Director, Indiana Division of Disability & Rehabilitative Services

Transforming Home and Community Based Services: The Massachusetts and New Jersey Models

Grand Ballroom D

Track: Systems Change

This informative session is co-presented by the States of Massachusetts and New Jersey to share their complimentary visions on the realignment of Long Term Care.

In 2005, the Massachusetts Executive Office of Elder Affairs (EOEA) launched an ambitious project designed to integrate its HCBS Waiver programs and its Older American Act programs in one unified statewide model. Using an integrated case management and billing IT system as its foundation, the project reflects EOEA's vision for integrated business intelligence and enhanced levels of service to its clients statewide. The project has achieved statewide integration of Medicaid Waiver programs and Older Americans Act services, state-funded programs, and Community Development Block Grants. Fully deployed to 2,500+ end users across Massachusetts, there are current-

WEDNESDAY, OCTOBER 1, 2008 CONTINUED

8:30 a.m. – 10:00 a.m.
(Continued)

ly more than 230,000 consumer records in the system, more than 3.4 million electronic service orders, 2.7 million service records, 377,000 assessments and more than 8.3 million progress notes.

New Jersey Division of Aging and Community Services' cutting edge vision to achieve the goals of nursing home diversion programs, which are designed to assist individuals at risk of nursing home placement and spend down to Medicaid to receive home and community-based services that enable them to continue to live in the community. To achieve this vision in an effective and efficient manner, states will require an information technology solution that improves consumer access to LTC services, supports a consumer-directed model, and enables states to track and trend important data elements and monitor the quality of services rendered.

PRESENTERS:

John Byer, Director of Sales for Aging and Adult Protective Services, Harmony Information Systems, Inc.

Joan O'Rourke, CIO, Massachusetts Executive Office of Elder Affairs

Nancy Field, New Jersey Division of Aging and Community Services

Jason Lenihan, Implementations Manager, Harmony Information Systems, Inc.

10:15 a.m. – 11:45 a.m.

Workshops

Transition of Many to One—The Implementation of the Statewide Vendor Fiscal Intermediary Service Organization (SVF-ISO) in Pennsylvania

Alcott

Track: Administration

Direction from the Centers for Medicare and Medicaid Services (CMS) for Pennsylvania to move away from county held provider contracts and to separate fiscal intermediary costs from direct service cost has inspired the Office of Developmental Programs (ODP) of Pennsylvania to implement a single, statewide vendor fiscal agent for consumers receiving mental retardation (MR) services across the Commonwealth. Coupled with the transition from multiple vendors to a Statewide Vendor Fiscal Intermediary Service Organization (SVF-ISO), ODP plans to move to a participant directed service (PDS) model with expanded budget authority in July 2009. The ISO plays an active role in the planning and claims processing function to support expanded authority for consumers. The presentation will offer a case study of an organization in transition to an ISO model, as a phased implementation launched July 1, 2008 for new participants.

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10:15 a.m. – 11:45 a.m.
(Continued)

The session will review the many challenges presented by the shift in the areas of:

- policy
- operations
- transition logistics, and
- the technological adaptability of the Home and Community Services Information System (HCSIS), a web enabled enterprise wide application that supports the administration of Home and Community Based Service (HCBS) waiver programs.

PRESENTERS:

Antonia Jimenez, Senior Manager, Deloitte Consulting

Julie Devaney, HCSIS Project Lead, Deloitte Consulting

Jeanne Meikrantz, PDS ISO Implementation Lead, Pennsylvania Office of Developmental Programs

Centers for Medicare & Medicaid Services Innovations and Policy Advancements: 27 Year Evolution in Home and Community Based Services

Commonwealth A-B

Track: CMS Workshop Series

As a result of partnerships with beneficiaries, advocates and states, the Centers for Medicare & Medicaid Services (CMS) has evolved policies over the past twenty-seven years in the area of Medicaid HCBS to find new flexibilities that more effectively address the needs of beneficiaries. This session will focus on the evolution of the Section 1915(c) of the Social Security Act, which was the springboard for Medicaid Home and Community Based Long Term Supports and Services.

Specific examples to be discussed include:

- services for children and adults in need of hospice, children and adults with mental health needs, Native American, people with autism, brain injury, or AIDS
- the parameters around the HCBS definition, and
- quality of services.

PRESENTERS:

Dan Timmel, Health Insurance Specialist, Disabled and Elderly Health Programs Group, CMSO, CMS

Anita Yuskas, Technical Director for HCBS, Disabled and Elderly Health Programs Group, CMSO, CMS

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10:15 a.m. – 11:45 a.m.
(Continued)

Navigating the Quality Improvement Ship in Blue Waters

Grand Ballroom C

Track: Quality

The Ohio Department of Aging's (ODA) Community Long Term Care Division and the Area Agency on Aging 10B, Inc. (AAA 10B), become shipmates to highlight Ohio's quality improvement strategy that includes knowing when to use buoys and kellicks (current quality improvement initiatives), how to use life jackets (preparing for a waiver review), knowing the ropes (lessons learned) and how to stay on board (AAA actions around quality). This session will demonstrate how the Ohio aging network is navigating through all types of waters in order to stay on course, as ODA and its 13 regional PASSPORT Administrative Agencies work to assure the program integrity of its three HBCS waiver programs through the use of an overarching quality management strategy. ODA and AAA10B will discuss their findings and demonstrate different remediation techniques that led to system improvement.

Specifically, presenters will discuss:

- the benefits of a strong and unified structure with input from multiple stakeholders in navigating through competing endeavors that could wreck a quality system
- the use of technology to convey consistent messages and expectations
- AAA 10B's experiences and steps in mastering quality in varying conditions, and
- AAA 10B's process designs and navigational processes to demonstrate findings and improvements in quality.

PRESENTERS:

Eric Miller, Quality Management Coordinator, Ohio Department of Aging

Sandee Ferguson, Senior Vice President, Area Agency on Aging 10B, Inc.

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10:15 a.m. – 11:45 a.m.
(Continued)

New York State's Long Term Care Councils: A Vehicle for Community Change

Grand Ballroom D

Track: Systems Change

As New York State is implementing NY Connects, its statewide point-of-entry program, counties are actively developing and using local Long Term Care Councils (LTCCs) to examine and analyze their long term care systems. Through these collaborative entities comprised of consumers, providers, elected officials and other stakeholders, LTCCs are identifying service gaps, duplication in the system and developing solutions and strategies to address the identified gaps. This workshop will describe the integral role of Long Term Care Councils in improving the long term care system in each county, as well as in New York State overall.

This session will provide details on accomplishments to date as well as strategies and activities being undertaken by the LTCCs to reform local long term care services, including:

- the composition of Councils and how to bring the right people to the table
- methods used to identify gaps such as surveys and focus groups
- topical areas of focus, and
- means of bringing down barriers.

PRESENTERS:

Gail Koser, Assistant Director, New York State Office for the Aging

Thea Griffin, Project Director, New York State Office for the Aging

Erin Stachewicz, Long Term Care Coordinator, Albany County Department of Social Services



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10:15 a.m. – 11:45 a.m.
(Continued)

Coordinating Community Long Term Care Services for Medically Complex Children: A MassHealth Model

Grand Ballroom E

Track: Supports for Community Living

Medically complex children can live safely at home, but doing so requires significant work for their families who, while providing hands on care, are also coordinating a myriad of services, providers and health care visits. This workshop will describe how Community Case Management (CCM), a program in Massachusetts, was designed to help these families through a single-entry point to access community long term care services, such as in-home continuous nursing services, non-nursing supports, home therapies, durable medical equipment, and medical supplies.

This session will explain the program in detail, including:

- the role of the CCM nurse case manager in conducting a comprehensive annual assessment, maintaining regular contact, and managing the family's acquisition of medically necessary services
- the support of a multi-disciplinary team consisting of pediatrician, physical therapist, respiratory therapist, occupational therapist, social worker, and pharmacist, and
- successes in assisting families in filling nursing hours, family satisfaction, and cost avoidance to the state through third-party liability identification.

PRESENTERS:

Jane Ryan, Director, Community Case Management,
UMASS Medical School, Commonwealth Medicine

Julie Meyers, M.D., Medical Director, Community Case
Management, UMASS Medical School, Commonwealth Medicine

Kay George, RN, Associate Director, Community Case
Management, UMASS Medical School, Commonwealth Medicine

Jessica Carpenter, Business Manager, Community Case
Management, UMASS Medical School, Commonwealth Medicine

Community Service Grants: Venture Capital for Transforming Minnesota's Long Term Care System

Hancock

Track: Systems Change

Minnesota has been working to rebalance its long term care system for the elderly for nearly 10 years. Its Community Service/Community Service Development (CS/SD) grant program has

WEDNESDAY, OCTOBER 1, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.

(Continued)

played a major role in providing seed money to organizations that want to try innovative projects that redesign components of the system and rebalance services. Representatives from the department of human services will present a newly released evaluation report of the accomplishments of this grant program over the past five years, and the role it has played as “venture capital” to transform and strengthen the capacity of the long term care system in order to meet the needs of the coming age wave.

The session will review specific activities including:

- nursing home closures
- expansion of home and community based services across the state, and
- strengthening the capacity of the informal and “quasi-formal” system of family, friends, neighbors, and volunteers.

PRESENTERS:

LaRhae Knatterud, Director, Aging Transformation, Minnesota Department of Human Services

Loren Colman, Assistant Commissioner, Continuing Care Administration, Minnesota Department of Human Services

Patricia A. Polansky, Assistant Commissioner, New Jersey Division of Aging & Community Services and National Association of State Units on Aging Board of Directors President

Addressing Direct Service Workforce Challenges in Partnership

Otis

Track: Caregiver Supports

While many states organize their long term services and supports and administering agencies according to age and disability categories, the National Direct Service Workforce Resource Center has found that many workforce challenges and workforce solutions transcend these categories. The current system of segmenting the long term supports workforce by the population they serve hinders the ability to take a more comprehensive and cohesive approach to addressing common challenges. In this session, presenters from PHI, the University of Minnesota Research and Training Center on Community Living, and the Annapolis Coalition will present a joint white paper on the extent to which workforce challenges and solutions are similar across aging, physical disability, behavioral health, and intellectual and developmental disability populations.

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10:15 a.m. – 11:45 a.m.
(Continued)

The workshop will cover the report's recommendations on how partnership and coordination across different agencies and stakeholder groups can:

- facilitate the sharing of expertise
- strengthen advocacy efforts
- lead to collaborative problem solving, and
- improve public policy with regard to the home and community based direct service workforce.

PRESENTERS:

Carrie Blakeway, Senior Manager, The Lewin Group

Amy Hewitt, Research Director, Research and Training Center on Community Living, University of Minnesota

Steve Edelstein, National Policy Director, PHI

Michael Hoge, PhD, Yale University School of Medicine

Kate King, Project Officer, Centers for Medicare and Medicaid Services

From Quality Management to Quality Improvement: Use of Evidenced Based Programs in Home and Community Based Services Waivers

Stone

Track: Quality

Many advances have been made in translating research findings into practical tools and resources that support healthy aging and disease self management. These evidence based programs are being disseminated, implemented, and evaluated through the aging network and by service providers. In this session, representatives from Maine, Georgia, and California will discuss the challenges and opportunities of piloting evidence based initiatives in their Home and Community Based Services (HCBS) Waiver programs. Participants will learn the elements of evidence based programs; find out how others have incorporated these elements into their on-going Waiver programs; and discuss the importance of these programs for quality improvement.

Specific programs to be described include:

- Maine's and Georgia's Healthy IDEAS program, which provides screening, education and management techniques for depression along with links to primary and mental health resources
- California's Healthy Moves and a Medication Management Improvement System, a physical activity program designed to enhance outcomes for frail, high risk and sedentary older adults receiving care management services in the home, and

WEDNESDAY, OCTOBER 1, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.

(Continued)

- the Golden State's Medication Management Improvement Program, designed to enable social workers and nurse care managers to identify and resolve medication problems of elders living in the community.

PRESENTERS:

Julie Fralich, Associate Director, Institute for Health Policy, Muskie School of Public Service, University of Southern Maine
Sharon Foerster, Director, Elder Independence of Maine
Sandy Atkins, Associate Director, Partners in Care Foundation
Eve Byrd, Associate Director, Fuqua Center for Late Life Depression



Administration on Aging Nursing Home Diversion Modernization and Veterans Directed Home and Community Based Service Grants

Webster

Track: Systems Change

As independence is the theme of this year's conference, it is fitting that the final session would highlight two programs designed to enhance independent community living for older adults. The U.S. Administration on Aging (AoA) Nursing Home Diversion Modernization Grants (NHDMG) and the Veterans Directed Home and Community Based Services Grants programs are competitive grant opportunities designed to assist individuals at risk of nursing home placement and spend-down to Medicaid to receive home and community based services that enable them to live independently in the community. This interactive session will present details on the two programs and involve participants in a discussion of ideas for the development of a comprehensive system.

Subjects to be covered include:

- a description of the infrastructure needed to implement the programs
- their functionality, and
- their value to beneficiaries and the American public.

PRESENTERS:

Lori Gerhard, Director, Office of Planning and Policy Development, U.S. Administration on Aging
Bob Hornyak, Director of Core Programs, U.S. Administration on Aging
Daniel Schoeps, Director of Long Term Care Purchasing, U.S. Veterans Health Administration
Patrick Brady, Coordinator of Purchased Long Term Care Reimbursement, U.S. Veterans Health Administration

WEDNESDAY, OCTOBER 1, 2008 CONTINUED

10:15 a.m. – 11:45 a.m.
(Continued)

Issues in the Development of Home and Community Based Services Programs for Persons With Mental Illness

Commonwealth C

Track: Systems Change

In this workshop, discussion will focus on the issues and barriers surrounding development of community based services and programs that serve the mentally ill.

Topics will include the following:

- Preadmission Screening and Resident Review (PASRR)
- characteristics of nursing facility care
- the role of the Medicaid Institutions for Mental Disease (IMD) exclusion in financing care for the mentally ill
- opportunities and limitations under 1915(c) waivers and the 1915(i) state plan option.

PRESENTER:

Jeffrey A. Buck, Ph.D., Chief of Survey, Analysis and Financing Office, U.S. Substance Abuse and Mental Health Services Administration

12:00 noon – 2:00 p.m.

Closing Plenary Luncheon—Grand Ballroom

Highlight of Federal Initiatives in Home and Community Based Services and Implications for the Future

Josefina G. Carbonell, Assistant Secretary for Aging, U.S. Administration on Aging

Herb B. Kuhn, Deputy Administrator, Centers for Medicare & Medicaid Services

Project 2020: Fulfilling the Promise of Home and Community Based Services and Supports

Patricia Polansky, President, National Association of State Units on Aging Board of Directors

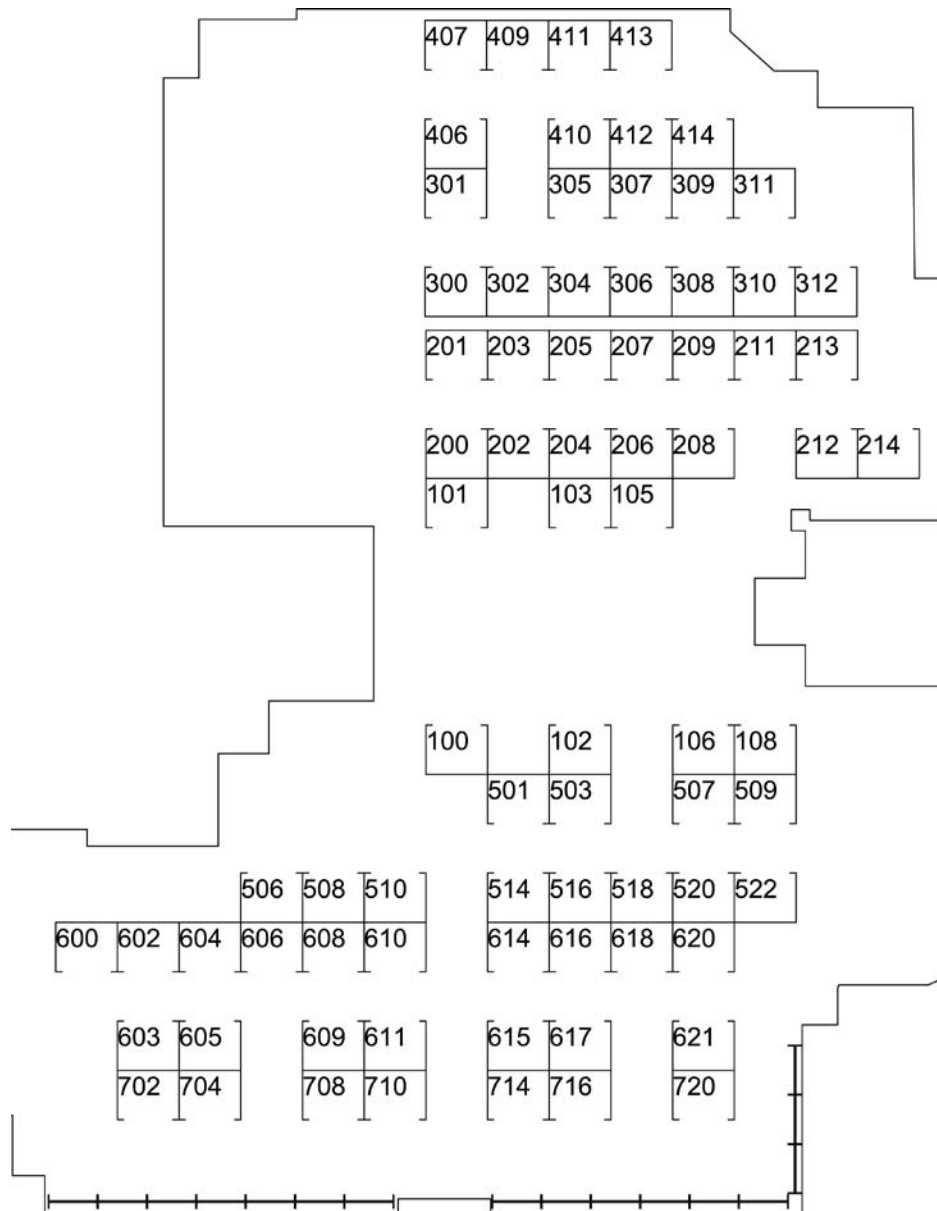
Charlie Sisson, Immediate Past President, n4a Board of Directors

Sandy Markwood, CEO, n4a

Martha A. Roherty, Executive Director, National Association of State Units on Aging

Exhibitor Guide

Don't miss this opportunity to meet and network with our exhibitors!



Monday, September 29, 2008

1:30 p.m. Exhibit Opens
 1:30 – 2:15 p.m. Dessert with Exhibitors
 4:30 – 6:00 p.m. Reception with Exhibitors

Tuesday, September 30, 2008

7:30 a.m. Exhibit Opens
 12:45 – 2:15 p.m. Dessert with Exhibitors

EXHIBITORS

Booth	Exhibitor
501	AARP Public Policy Institute
518	Acumen
202	ADRC-TAE
610	ADT Security Services, Inc.
606	Advocates, Inc.
604	AGIS Network, Inc.
305	Alzheimer's Store
616	American Ramp Systems
614	APS Healthcare
211	Aribitre Consulting, Inc.
206	Bateman Senior Meals
507	Boehringer Ingelheim
306	Bowman Systems
103	CareStar
308	Cash and Counseling/ Boston College
205	Center for Information Management, Inc.
213	Centers for Medicare and Medicaid Services (CMS)
506	Consumer Direct Personal Care
307	Deloitte Consulting
514	G.A. Food Service
106, 108	Greystone Consumer Empowerment Systems

Booth	Exhibitor
602	Harmony Information Systems, Inc.
520, 522	HCBS Strategies, Inc.

Booth	Exhibitor
510	hcbs.org Clearinghouse
600	Institute for Genetic Social Work



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304	IntgriCor, LLC
302	JEVS Support for Independence
509	Mains'l Services Inc.
212	Massachusetts Executive Office of Elder Affairs
105	Molina Healthcare, Inc.
618	Mom's Meals
516	Morning Star Financial Services
310	My Way Village

Booth	Exhibitor
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201	Myers and Stauffer, LC
214	n4a
208	National Association of State Units on Aging (NASUA)
301	NCB Capital Impact
503	Public Partnership, LLC
101	Qualis Health
300	ResCare
209	RTZ Associates
309	Safeway Safety Step, Inc.
200	The Lewin Group

Booth	Exhibitor
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100	Thomson Reuters
312	U.S. Administration on Aging (AoA)
203	U.S. Department of Health and Human Services (HRSA)
102	Umass Medical School—Commonwealth Medicine
202	UnitedHealth Group
207	Vocational Research Institute

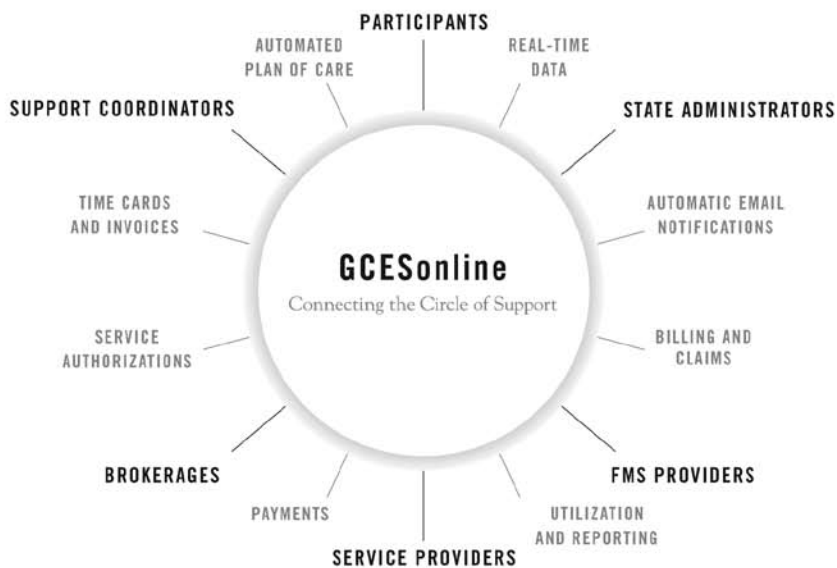
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Exhibitors

AARP Public Policy Institute

BOOTH: 501

601 E Street, NW
Washington, DC 20049
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Fax: (202) 434-6480
Email: wfggrage@aarp.org

The AARP Public Policy Institute (PPI) is the focal point for public policy research and analysis at AARP. Its mission is to inform development of AARP's public policy positions and to contribute to public debate on issues of importance to midlife and older Americans. PPI's research focuses on issue areas including economic security, health care, independent living and long-term care, and consumer protection and empowerment.

Acumen

BOOTH: 518

4542 Inverness
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Email: marilyn.brown@aol.com

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The ADRC Technical Assistance Exchange provides technical assistance and training to states and local organizations related to single-point-of-entry systems for long term services and supports, ADRC initiatives, and state nursing home diversion efforts. Our website (www.adrc-tae.org) offers an extensive collection of tools, issue briefs, sample materials, and other resources for streamlining access to long-term care, community partnerships, long-term services options counseling, outreach and marketing, and much more. ADRC-TAE, led by the Lewin Group, is funded by the Administration on Aging and operated in partnership with CMS.

ADT Security Services, Inc.

BOOTH: 610

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Palm Harbor, FL 34684
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Phone: (877) 456-1787 x4644
Fax: (877) 666-4390
Email: ltuten@adt.com

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Advocates, Inc.**BOOTH: 606**

One Clark Hill, Suite 305
Framingham, MA 01702

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Phone: (781) 910-7216
Fax: (508) 861-9933
Email: jkeilso@advocatesinc.org

Founded in 1975, Advocates, Inc. is one of the largest human services organizations in Massachusetts, serving more than 800 elders, youth in transition, and individuals with disabilities, including Traumatic or Acquired Brain Injury by providing residential, employment and day supports. Our residential services include shared living, supportive housing, in-home supports and adult foster care. Our programs for individuals with Prader-Willi Syndrome and for Deaf and Hard of Hearing persons with disabilities are nationally recognized. Learn more about us at www.advocatesinc.org.

AGIS Network, Inc.**BOOTH: 604**

13 Steele Avenue
Annapolis, MD 21401
Contact: Alan Schreitmueller
Phone: (443) 995-1827
Email: al@assitguide.com

AssistGuide Information Services (AGIS Network) is a leader in the Online Aging and Disability Resource Center for AAAs and State Units on Aging. Our unique e-form technology for improved access to services for consumers is used across the country. Our toolkits allow Agency personnel to maintain their own content. AGIS also provides complementary products for use with those of Harmony Information Systems.

Alzheimer's Store**BOOTH: 305**

3197 Trout Place Road
Cummings, GA 30041
Contact: Ellen Warner
Phone: (678) 947-4001
Fax: (678) 947-8411
Email: ewarner@alzstore.com

The Alzheimer's Store provides tools people with dementia and their caregivers need to maintain independent, safer, fuller and richer lives. Products are selected and categorized according to stage (early, middle and late stage) of the disease and use (forgetfulness, ADL's, safety, wandering, fall safety and prevention, lifting and transferring, activity products, brain and thinking activities, communication tools, baby doll therapy, books, exercise and more).

U.S. Administration on Aging**BOOTH: 312**

One Massachusetts Avenue
Washington, DC 20001
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Phone: (202) 357-3545
Fax: (202) 357-3549
Email: greg.link@aoa.hhs.gov

The Administration on Aging (AoA) provides national leadership, funding, technical support and oversight to the Aging Services Network, which in turn is charged under the Older Americans Act with the responsibility for promoting the development of a comprehensive and coordinated system of home and community based services for older people and their family caregivers. The Aging Services Network consists of a variety of national organizations, 56 State Units on Aging, 655 Area Agencies on Aging, more than 240 tribal organizations, 29,000 community services provider organizations and 500,000 senior volunteers. This network reaches into every community in the nation and plays an important role in delivering services and supporting consumer centered systems of care that enable older individuals to remain in their own homes and communities for as long as possible.

APS Healthcare**BOOTH: 614**

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Silver Spring, MD 20910

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Email: jlichtenheld@apshealthcare.com

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Arbitre Consulting, Inc.**BOOTH: 211**

PO Box 860029

Shawnee, KS 66286

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Phone: (913) 667-3981

Fax: (913) 667-3983

Email: rbefort@gmail.com

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Cash and Counseling/Boston College**BOOTH: 308**

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Chestnut Hill, MA 02467
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Fax: (617) 552-1975
Email: elizabeth.maguire.1@bc.edu

Cash & Counseling helps participants in 15 states direct and manage their personal assistance services according to their own specific needs. The project provides Medicaid consumers with disabilities more choices about how to get help at home by giving participants the option to manage a flexible budget and decide for themselves what mix of goods and services will best meet their personal care needs. Our website houses resources for program administrators, researchers, and policymakers including research reports, grantee-produced materials, success stories, and the soon-to-be-released Handbook on Self Direction.

Center for Information Management, Inc.**BOOTH: 205**

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The Centers for Medicare & Medicaid Services (CMS) is the Federal agency that administers the Medicare program and provides funding and guidance to the State Medicaid and State Children's Health Insurance (SCHIP) programs.

Centers for Medicare & Medicaid Services (CMS)**BOOTH: 213**

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Washington, DC 20201
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The Centers for Medicare & Medicaid Services (CMS) is the Federal agency that administers the Medicare program and provides funding and guidance to the State Medicaid and State Children's Health Insurance (SCHIP) programs.

Consumer Direct Personal Care**BOOTH: 506**

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Email: billw@consumerdirectonline.net

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HCBS Strategies, Inc.**BOOTH: 520, 522**

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Phone: (410) 858-0807
Fax: (410) 510-1144
Email: kristy@hcbis.info

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hcbs.org Clearinghouse**BOOTH: 510**

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Phone: (617) 552-3484
Fax: (617) 552-1975
Email: vitaleb@bc.edu

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Health Resources and Services Administration**BOOTH: 203**

U.S. Department of Health and Human Services

Room 10-29, 5600 Fishers Lane
Rockville, MD 20857

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Phone: 301-443-1512

Fax: 301-480-0773

Email: Arross@hrsa.gov

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Institute for Geriatric Social Work**BOOTH: 600**

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Boston, MA 02215

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Fax: (617) 358-2636

Email: annap@bu.edu

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Phone: (303) 828-3437

Email: dtocco@integricor.com

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JEVS Support for Independence**BOOTH: 302**

Monroe Office Center
1 Winding Way, Suite 100
Philadelphia, PA 19131

Contact: Erinn Rinn
Phone: (267) 298-1327
Fax: (267) 298-1381
Email: erinn.rinn@jevs.org

JEVS Supports for Independence empowers seniors and people with disabilities to self-direct their own care, enabling them to remain independent and in their own homes with a broad continuum of high-quality personal assistance, fiscal and human resource and service-coordination supports.

The Lewin Group**BOOTH: 200**

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Maple Grove, MN 55371

Contact: Tracy Hinkemeyer

Phone: (763) 416-9109

Fax: (763) 416-9120

Email: tehinkemeyer@mainsl.com

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Massachusetts Executive Office of Elder Affairs**BOOTH: 212**

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Email: kathy.campbell@state.mn.us

The Executive Office of Elder Affairs (EOEA) provides services in 351 Massachusetts communities via Aging Services Access Points, Area Agencies on Aging and Councils on Aging. EOEA helps elders needing home care and caregiver support, nutrition programs, protective services, low cost prescription drugs, health care and housing options, employment and financial counseling, and volunteer opportunities.

Molina Healthcare, Inc.**BOOTH: 105**

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Email: katherine.thomson@molinahealthcare.com

Molina Healthcare is a multi-state managed-care organization that participates exclusively in government-sponsored programs for low-income persons. Molina is committed to providing access to compassionate, quality healthcare and today serves more than 1.2 million members in nine states, including persons in long-term care and home- and community-based populations.

My Way Village**BOOTH: 310**

300 Congress Street

Quincy, MA 02169

Contact: Brenda Limone

Phone: (617) 328-1600

Fax: (617) 328-1771

Email: blimone@mywayvillage.com

The Connected Living program from MyWay Village and RewardingWork.org is an online tool for Seniors and people with disabilities. Connected Living offers simplified applications and training to help communicate with family and the community and secure the personal care resources necessary to thrive at home.

Myers and Stauffer, LC**BOOTH: 201**

11440 Tomahawk Creek Parkway
Leawood, KS 66211

Contact: Amy Manske
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Myers and Stauffer LC provides professional accounting, consulting, data management and analysis services to state and federal agencies managing government-sponsored health care programs. The firm offers 30 years experience assisting Medicaid agencies with complex reimbursement issues for all provider types.

Services include cost-report audits, desk review and settlements; nursing facility case mix rate setting and MDS verification; hospital DRG, APC and DSH consulting; federal revenue maximization; pharmacy dispensing and ingredient reimbursement; claims review and program integrity; reimbursement system design and implementation.

n4a**BOOTH: 214**

1730 Rhode Island Avenue, NW, Suite 1200
Washington, DC 20036

Contact: Sandra Reynolds
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Email: sreynolds@n4a.org

The National Association of Area Agencies on Aging (n4a) is the leading voice on aging issues for Area Agencies on Aging (AAAs) and Title VI-Native American aging programs in our nation's capital. n4a administers the Eldercare Locator, a public service of the U.S. Administration on Aging, your connection to aging resources in any U.S. community (800.677.1116, www.eldercare.gov).

National Association of State Units on Aging (NASUA)**BOOTH: 208**

1201 15th Street, Suite 350

Washington, DC 20005

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Email: kfletcher@nasua.org

Founded in 1964, the National Association of State Units on Aging (NASUA) is a non-profit association representing the nation's 56 officially designated state and territorial agencies on aging. NASUA supports its members at the national level in promoting the health and well-being, rights, dignity and independence of older persons, adults with disabilities and their families.



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NCB Capital Impact**BOOTH: 301**

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NCB Capital Impact's Center for Excellence in Long Term Supports brings together cross-cutting technical assistance in housing and real estate finance, Medicaid and community-based services, business strategy, and business financing in a mission-driven context. Our mission is to provide innovative conceptual and practical tools to meet the growing demand for long-term supports.

Public Partnership, LLC**BOOTH: 503**

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Boston, MA 02109

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Public Partnerships, LLC is a pioneering financial-management services firm and Fiscal Employer/Agent based in Boston, MA. After working as a consultant with the Robert Wood Johnson Foundation and the self-determination pilot programs in 1997 to create the Owner's Manual for Self-Determination, PPL was founded as a financial management services company in 1999 to provide financial management, customer services, support-broker and related services to public agencies developing consumer-directed programs focused on the needs of individual participants. PPL's contracts in 14 states serve more than 20,000 persons with developmental disabilities, children (and their families) with serious mental illness, and older adults with chronic health care conditions, physical and mental disabilities, and children with Autism and their families.

Qualis Health**BOOTH: 101**

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Qualis Health is a non-profit healthcare quality-improvement organization that has provided an integrated suite of care-management and waiver-review services to state Medicaid agencies since 1975. Through our products, we collaborate with providers, patients, and families to control costs while improving the quality of healthcare services. Qualis Health's comprehensive reporting abilities help to demonstrate the positive financial, clinical, and satisfaction outcomes resulting from interventions by our multi-disciplinary team of clinicians.

ResCare**BOOTH: 300**

9901 Linn Station Road
Louisville, KY 40223

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RTZ Associates**BOOTH: 209**

150 Grand Avenue, Suite 201
Oakland, CA 94612

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Safeway Safety Step, Inc.**BOOTH: 309**

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Fairfield, OH 45014

Contact: Chris Stafford
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Thomson Healthcare**BOOTH: 100**

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**UMASS Medical School—
Commonwealth Medicine****BOOTH: 102**

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Commonwealth Medicine is the public health education, research, policy and services consulting division of the University of Massachusetts Medical School. We help municipal, state and federal governments, managed care organizations and other non-profits improve their health care policies and services through innovative consulting and service models.

UnitedHealth Group**BOOTH: 202**

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Vocational Research Institute**BOOTH: 207**

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