

**Evaluation Peer Workgroup Call: Measuring Options Counseling
July 27, 2006**

Lewin Staff:

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Participants:

Maureen Strickland, WI	Tim Catherman, VA
Mel Phillips, NV	Brenda Goodman, VA
Heather Johnson-Lamarche, VT	Anne Hewitt, NJ
Joe Rembert, AL	Sue Williams, KY
Stephanie Lyon, MD	Stephanie Hull, MD
Karen Roberto, VA	Belinda Bruns, TN
Gene Rosser, MD	Linda Bassham, SC
Sandi Smith, FL	Nora Barkey, MI
(Other callers, not identified)	

During the call, participants provided input into the process of evaluating options counseling by brainstorming key elements comprising this important ADRC assistance function.

Key Questions

1. What are the goals of options counseling?;
2. What are ADRCs trying to achieve in providing options counseling services, i.e., what are the expected outcomes of options counseling?; and
3. How can we measure attainment of goals related to options counseling?

The objective of the discussion was to draw on the expertise of ADRC staff, including options counselors and program evaluators, in answering the three key questions outlined for the call. Participants were encouraged to share their challenges, insights, and experiences with options counseling in order to further the development of evaluation strategies that will improve the effectiveness and quality of this important ADRC service component.

Introductions

The workgroup discussion began with introductions and each participant was asked to describe their approach to evaluating options counseling or where they were in the

process of developing an evaluation approach to measuring options counseling. Most participants noted that they were in the early stages of developing an approach to evaluating options counseling. Several participants noted that they are using their consumer satisfaction surveys or client service scorecards to measure satisfaction with services, including I&R services, and that is how they are examining options counseling at the present time.

Brainstorming Session

Lewin staff provided a framework for the brainstorming session that included presenting an overview of the definition of options counseling and reviewing three topical areas for discussion during the call: the goals of options counseling; expected outcomes of options counseling and possible outcome indicators. It was agreed that the ideas that emerged at this stage of the discussion would be shaped into more defined evaluation approaches in a subsequent discussion; for now, the objective was to get all ideas on the table for discussion.

Goals for options counseling that were presented and discussed included:

- To provide people with the information they need to make informed choices – thereby maximizing consumer choice;
- To maximize consumer independence – prevent unnecessary institutionalization;
- To help people make informed decisions and that the information was complete and helpful;
- To help people plan for the future – to avoid “if I’d only known” crises;
- To assist people live health lives in the community;
- To facilitate access to long-term care services and supports in the community’
- To proactively match peoples’ needs and preferences with appropriate services, through guidance;
- To maximize cost-effectiveness of long-term care services; and
- To identify gaps in services and inform consumers, professional staff and legislators about the lack of availability of certain services.

Expected outcomes that were presented and discussed included:

- The information offered is accurate, timely and culturally appropriate;
- People indicate that they were able to make informed choices;
- There are enough options for people to have a real choice;
- Advice offered is intelligent, practical and sound;
- People have a greater sense of empowerment;
- Consumers report that information was useful, helpful, complete;
- People are reached, and have the relationship in place, when they are ready to hear the message;

- Options presented are realistic;
- ADRC staff has the expertise to offer appropriate guidance;
- ADRC staff is well-informed about consumer needs and preferences;
- Consumers report good fit between needs/preferences and services received.

Closing Comments

The goals and expected outcomes were entered into a matrix during the call and it was noted that the ideas would be available for further discussion, refinement and clarification on the next call. Lewin staff will post the matrix, with the brainstorming ideas from this discussion included on it, and will circulate the matrix prior to the follow-up discussion planned for the next Evaluation Workgroup Meeting.

Next Evaluation Workgroup Meeting:

The next workgroup meeting will be held September 28, 2006. Participants will continue discussion and finalize the strategizing chart regarding the goals, expected outcomes and potential indicators of options counseling.