



Core Competencies of Options Counseling: Encouraging Future Orientation

Long-Term Support Options Counseling is an interactive decision-support process whereby consumers, family members and/or significant others are supported in their deliberations to determine appropriate long-term care choices in the context of the consumer's needs, preferences, values, and individual circumstances.¹ The Technical Assistance Exchange (TAE) has worked with states implementing options counseling in their Aging and Disability Resource Center (ADRC) programs to identify six core competencies of options counseling that should underpin the process:

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

This series of handouts details some key considerations for program planners and managers and key staff involved in options counseling. The information is based on current practices in the field, and will continue to evolve as more ADRCs develop robust options counseling programs. Over the next year, the Administration on Aging (AoA) will be working with a group of states to develop national standards for options counseling, and this work will also impact and contribute to these concepts.

This handout discusses strategies and resources for encouraging future orientation. Please let us know if you have comments, suggestions, or questions about these handouts by contacting the Technical Assistance Exchange at adrc-tae@lewin.com

¹ Definition developed by Technical Assistance Exchange including National Association of State Units on Aging and ADRC grantees

Encouraging Future Orientation

Options counselors have the responsibility of helping individuals weigh the pros and cons of various options. They can help people envision what the near future would look like if certain choices were made as well as encourage people to plan for future long-term support needs. Encouraging future orientation promotes the overall goals of the ADRC to facilitate informed decision-making by encouraging wise use of existing resources and preventing or delaying spend-down to Medicaid.

Strategies for Staff Providing Options Counseling

Many individuals do not plan for the future, or find it challenging to think ahead. The options counseling process offers an opportunity to customize support to a specific individual's situation in the context of a relationship of trust. This trust makes difficult conversations about the future possible. Options counselors can help consumers weigh the pros and cons of different choices by asking questions such as "What might happen if you take no action?" or "What might happen if you tried a homemaker twice a week?" Options counselors can also assist families to anticipate and plan for future needs by presenting questions to consider such as "What would you like to do when your daughter (caregiver) goes back to work full-time?" and "Where would you like to be living in five years? Ten years?"

Techniques of motivational interviewing can also be helpful in exploring the future with individuals. For example, for an individual who expresses a desire not to move, has some functional limitations, but will not accept help in the home, an options counselor might explore with the individual the importance of staying at home on a readiness scale from 1-10. These conversations about importance level can then lead into what it would take to accomplish staying in one's own home. Using these techniques to tap into internal motivation rather than rationalizing with individuals about how they should accept help so that they can stay in their home longer will go much farther in moving individuals toward change.

The PATH Person Centered Planning tool can also be helpful in encouraging future orientation. It is a facilitated process by which individuals name a "north star" or goal they would like to achieve and begin a discussion of how to get there.

Strategies for Program Planners and Managers

Program planners and managers should support staff in obtaining and maintaining the skills above. Discussions at staff meetings and mentoring can help ensure options counselors are exploring creative ways of engaging with individuals to encourage future orientation. Listening in on sessions or calls with the options counselors can be an opportunity to provide constructive feedback.

Additional Resources for Encouraging Future Orientation

- *National Clearinghouse for Long-Term Care Information*. This web site was developed by the U.S. Department of Health and Human Services to provide information and resources to help individuals plan for future long-term care (LTC) needs
http://www.longtermcare.gov/LTC/Main_Site/index.aspx

- *A House in Order: How Planning for Your Aging Can Bring Peace of Mind: Ozaukee County Aging Services.* This document will help a consumer take an inventory of the values and preferences most important to him or her as they age or develop long-term support needs. A good plan can help older adults enjoy every day, stay as healthy as possible, get help when it is needed, and avoid a crisis. http://www.adrc-tae.org/tiki-download_file.php?fileId=26901

- *AARP Prepare to Care Booklet.* A resource to help families plan for long-term care. http://www.adrc-tae.org/tiki-download_file.php?fileId=26466

- *Call Listening Form.* This document is used by the Brown County, Wisconsin ADRC site to provide feedback to staff after call listening by a supervisor. Call listening is a quality improvement strategy used by the Brown County ADRC to ensure staff are appropriately responding to initial calls to the ADRC and remaining open to the need for options counseling. The form also assesses staff competency in incorporating motivational interviewing skills into interactions with consumers and helps identify training needs. http://www.adrc-tae.org/tiki-download_file.php?fileId=29302

- *PATH: a Workbook for Planning Positive Possible Futures. Planning Alternative Tomorrows with Hope for Schools, Organizations, Businesses and Families. Written by Jack Pearpoint, John O'Brien, and Marsha Forest.* PATH is a creative planning tool which starts in the future and works backward to an outcome of first steps that are possible and positive. PATHs were designed to deal with complex issues for individuals, families, and organizations.