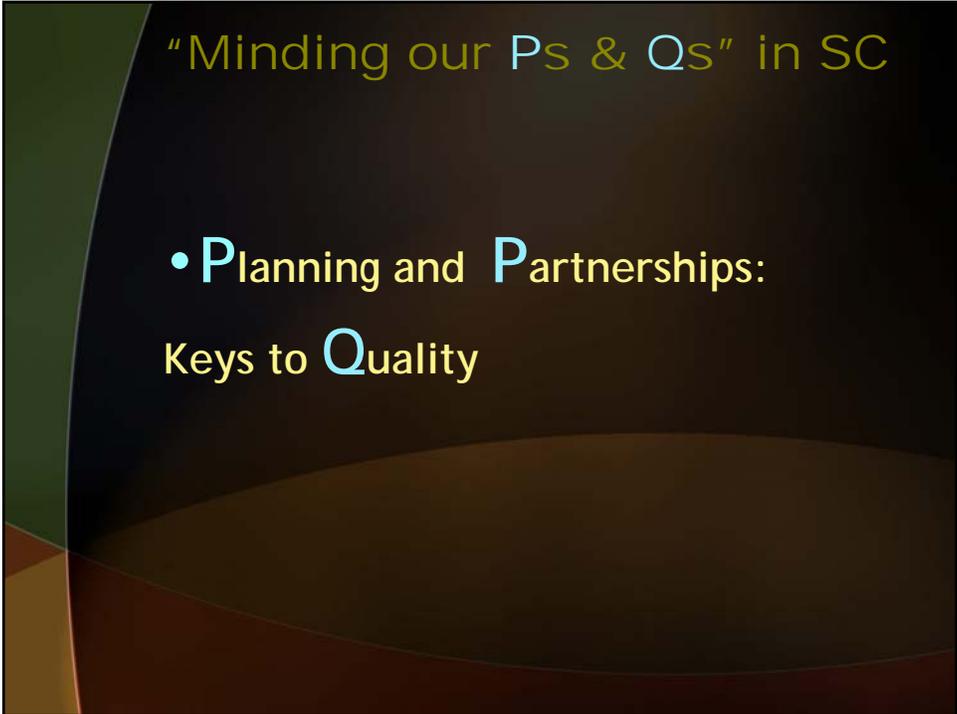


Planning and Partnerships:  
Keys to Streamlining Access to  
Long Term Care

“Working Together to Build the Future of  
Long Term Care”

AOA SUMMIT December 6, 2006

Barbara S. Kelley, Deputy Director  
SC Lieutenant Governor’s Office on Aging



“Minding our Ps & Qs” in SC

• **P**lanning and **P**artnerships:  
Keys to **Q**uality

## The South Carolina Experience

- Planning the ADRC pilot in SC
- Listening - What we heard from consumers
- Partnership Building
- Successes
- Challenges
- Lessons learned

## Listening

- Olmstead Governor's Task Force held forums and public hearings
- NASUA grant for promoting consumer direction in aging services - received 489 responses to survey from consumers of aging and disability services

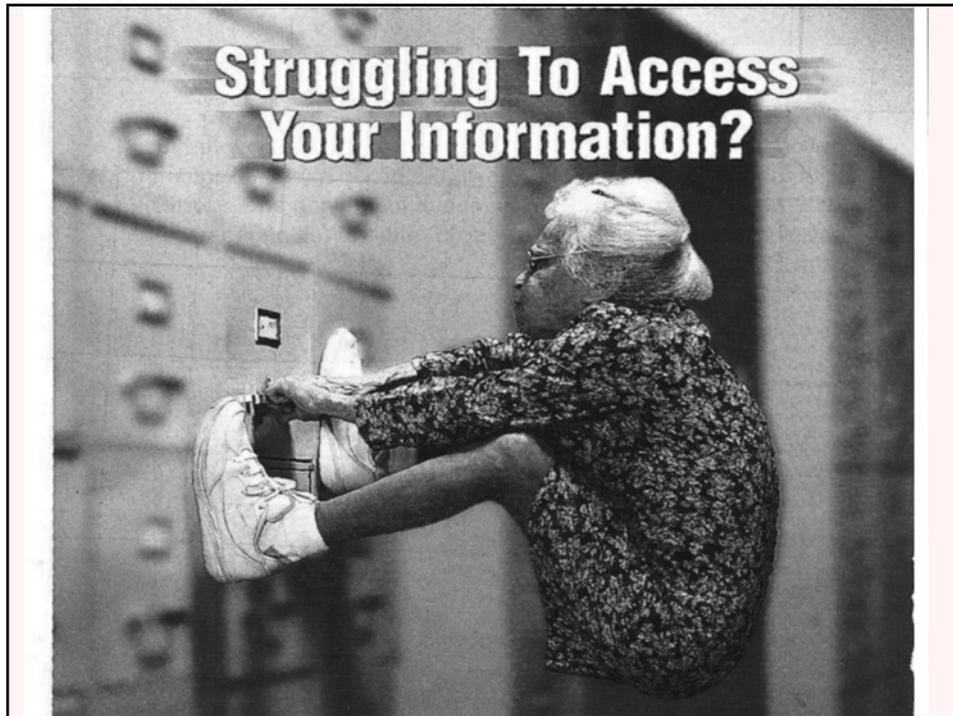
## Listening:

### What We Heard

- I don't know what help is available.
- Where can I get information?
- Who do I call for assistance?
- Who does what?
- It's a maze!
- What do I have to do to get help?
- Am I eligible for services? Who can tell me?

### What We Heard

- Frustration with trying to find help;
- Frustration about the need to tell story over and over;
- Frustration about the lack of coordination between agencies and being bounced between agencies;
- Frustration about the lack of resources, especially home and community based services



## Planning for Change

- Start with the end in mind - streamlined access
- Plan with the consumer in mind
- Identify partners and stakeholders
- Identify community resources
- Allow time for planning and partnership building prior to implementation

## Laying the Foundation

- Cooperative Agreement with AoA & CMS
- Retreat with state and local partners and stakeholders
- Target populations: older adults and adults with physical disabilities
- Consumers and partners involved in meaningful ways from the beginning

## State and Local Partners



## Meeting with Local Partners Prior to Application

- Aging Service Providers
- District Medicaid
- 211 Helpline
- Dept of Social Services - county
- Community Services Network Pres.
- Private NHs and Assisted Living
- Employment One-Stop
- Behavioral Health Center/Hospital
- Regional Medical Centers
- Regional Mental Health Center

## State Level Partners

- Lt. Governor's Office on Aging
- Department of Health & Human Services (Medicaid Agency)
- Department of Vocational Rehabilitation
- Real Choice Advisory Committee composed of consumers and agency representatives

## Planning Retreat

- National experts as facilitators
- Neutral setting - retreat center
- Building partnerships
- Building a shared vision
- Developing a common understanding of AoA/CMS expectations for ADRCs

## Planning Retreat

- Exploring possible models for ADRC
- Identifying strengths and resources
- Identifying potential barriers
- Defining "next steps"
- Beginning steps for strategic plan

## Developed Partnerships



- Philosophy of working together to help consumers access services
- Developed Partner Agreements (MOAs)
- Use SC Access for electronic referrals
- Advisory Committee and work groups guided the project development and outreach activities

## Established Local Advisory Committee

- Key Partners Served on ADRC Advisory Committee
- Helped with marketing, IT design & development, outreach, defining target population, identifying community resources, developing referral protocols

## Strong Medicaid Partnership

- Joint staff meetings
- Shadowing
- Involved staff in planning strategy for streamlining access to publicly funded long term care
- Developed capability for electronic referrals
- Developed written protocols

## State Level Medicaid Partnership

- Memorandum of Agreement for ADRC
- Monthly Management Team Meeting
- State level support for local collaboration
- Developed electronic forms and application process
- Electronic application process started with ADRC pilot counties

## Lower Savannah ADRC Kick-off



## Planning

Systematically Building

Step  
by  
Step

## Phases of Systems Change in SC

### Phase One:

- Real Choice Grant
- Nursing Home Transition (Home Again) Grant
- Promoting Consumer Direction in Aging Services (NASUA) Grant

### Phase Two\*:

- SC Access Plus (ADRC) Grant
- Medicaid Infrastructure Grant

### Phase Three:

- Systems Transformation Grant
- Family-to-Family Health Information & Education Grant

## ADRC Pilot & Expansion

- Original pilot site - focus on two counties & two target populations
- Planned for statewide expansion from the beginning
- In year 3 sought funds for expansion
- Now expanding into 4 new regions
  - Santee Lynches - open
  - Appalachia - to open soon
  - Trident - in development
  - Pee Dee - in development

## Accomplishments of ADRC

- Integrated all information and assistance functions at the ADRC;
- Expanded assistance and long term support counseling functions;
- Created a seamless system with Medicaid eligibility determination and Medicaid waiver services;
- Streamlined access to Medicaid long term care services through an electronic application for financial eligibility; and
- Improved coordination with critical pathway partners.

## Challenges

- Building common ground between aging and disability advocates
- Responding to multiple state and federal reporting requirements - navigating multiple management information systems while maintaining attention to primary goal of customer service
- Balancing the unexpected demands of Medicare Part D with other planned activities

## Challenges continued

- “Translating” Medicaid language into consumer friendly language on the e-form without losing needed details
- Sustainability
- Marketing

## Lessons Learned

- Changing systems takes time
- Building partnerships is a key to success
- Building and maintaining partnerships takes time
- On-going training is needed
- For expansion, maintain key functions but build on community strengths and allow flexibility

## **“Unplanned” results from Partnerships**

- **Medication Assistance Program in partnership with coalition of faith groups**
- **Co-location of “Family Connection” staff member at ADRC**
- **Medicare Part D activities increased ADRC visibility**

## **In Summary**

- **Planning and Partnerships were key to laying the foundation for the “no wrong door” model of the SC ADRC pilot**
- **Working together we can accomplish more than working alone**
- **We accomplish more when it doesn’t matter who gets credit**
- **When service providers collaborate or coordinate, consumers benefit**

## Planning and Partnerships Provide

- Vision
- Energy or synergy
- Imagination and creativity
- Experience
- Commitment
- Community support
- Sustainability