

**New Community Opportunities Center at
ILRU Presents...**



**The CIL and ADRC Connection:
The Oregon Story**

May 14, 2014

3:00 P.M.- 4:30 P.M. EDT

Presenter:

Barry Fox-Quamme

Speaker Introduction



Barry Fox-Quamme – Executive Director of Independent Living Resources (ILR – Portland, OR CIL) since January 2006

Related Affiliations:

- Founding Member of Metro Portland ADRC Consortium Governing Board
- Metro Portland Representative to the Oregon ADRC Team
- Oregon CIL Representative on ACL's ADRC Federal Workgroup: Eight Part A Granted States
- Member of the Oregon State Independent Living Council (SILC)
- Oregon SILC Executive Committee Member
- President of the Association of Oregon Centers for Independent Living (AOCIL)
- IL-NET (APRIL) Peer Mentor for CIL-to-CIL Executive Director Mentoring Program

Webinar Objectives

1. Identify the IL role in collaborating with ADRC lead agencies.
2. Describe benefits and advantages of collaboration between CILs and ADRCs.
3. Identify examples of challenges and risks of collaboration between CILs and ADRCs.
4. Describe effective strategic approaches one CIL has used to develop partnerships with ADRCs in their state for achieving the best outcomes for consumers.

Objective 1:

Identify the IL role in collaborating with ADRC lead agencies.

IL Movement and ADRC System

- The IL Movement is a key player in the development of the “No Wrong Door” ADRC system.
- CILs have an opportunity to join senior and disability service providers in a new type of collaboration
- The IL role brings a peer-based culture to the collaboration that is person-directed, person-centered and advocacy focused.

The IL Role as Peer-based

IL staff members bring a unique peer perspective to traditional senior-focused Information & Assistance, Information & Referral and Options Counseling

IL peer perspective especially engages the dominant AAA (Area Agency on Aging) culture during joint staff trainings

The IL Role as Person Directed, Person-Centered

IL staff members who experience disability potentially embrace a unique perspective that can assist other partners in appreciating the distinction between person-centered and person-directed.

The IL Role as Advocate

IL staff members have an opportunity to influence change in the dominant AAA senior service culture by advocating for systems change that values the advantages associated with peer-based services that emphasize person-directed planning.

Questions?

Objective 2:

Describe benefits and advantages of collaboration between CILs and ADRCs.

Benefits and Advantages

- Creating new collaborative advocacy system (ADRC)
- Integrating consumer data care modules (software)
- Demonstrating efficiencies to funders (legislature)

Creating new collaborative advocacy system (ADRC)

- Opportunity to explore and integrate service silos
- Opportunity to introduce IL Philosophy and service model to senior and health care service sectors
- Opportunity to tell IL story in new ways to legislators

Integrating consumer data care modules (software)



- Opportunity to access and engage senior-focused and 211 statewide database systems
- Opportunity to re-think CIL database systems, e.g., CIL database providers reaching out to engage ADRC

Demonstrating efficiencies to funders (legislature)



- Opportunity to collaborate with state agencies in seeking new State General Funds (SGF) for ADRC-based service initiatives
- (Expanded Oregon SGF for Options Counseling, Gatekeeper, Mental Health & Oregon Project Independence for younger people with disabilities)

Questions?

Objective 3:

Identify examples of challenges and risks of collaboration between CILs and ADRCs.

Challenges and Risks: Questions to Ask

- Will AAA lead for ADRC value engaging IL culture?
- Is the CIL able to advocate effectively over time to engage a more dominant senior service culture?
- Is the CIL able to influence the development of a new cross-service sector paradigm?
- Can CILs afford to risk not being at the table and thus potentially being on the menu?

Webinar Objective 4:

Describe effective strategic approaches one CIL has used to develop partnerships with ADRCs in their state for achieving the best outcomes for their consumers.

Exploring the Oregon CIL Experience of ADRC



Oregon's Federal ADRC Grant

- Oregon is one of 8 states to receive a \$2.4 million ADRC Part A Grant in 2012.
- The other 7 states are: Washington, Wisconsin, Maryland, Connecticut, Massachusetts, New Hampshire, and Vermont.
- Representatives of the 8 states meet with the Administration for Community Living (ACL) to collaborate around ADRC development between CILs, AAAs and other community stakeholders.

Oregon's Federal ADRC Grant, cont'd.



- ACL has scheduled Part A Grant State representatives three times to meet in Washington, DC for Learning Collaborative Sessions

April & October 2013, and February 2014

(Government shutdown canceled October 2013)

- The Part A Grant states also provide feedback for the development of national guidelines for establishing a national Options Counseling Certification system.

Year One Grant Dynamics in Oregon



- The Oregon State Unit on Aging (SUA) houses the ADRC grant and manages the development of nine (9) regional ADRC Teams across the state.
- Oregon ADRC goals are to establish an active, no wrong door system, a connection between partners serving seniors and people with disabilities.

Year One Grant Dynamics in Oregon, cont'd.



- Each regional Governing Board was charged with creating and submitting an annual work plan to the SUA ADRC Director for approval.
- Plan development includes the requirement that a consumer advisory council be established to provide input and direction for the Governing Board.
- The nine Oregon ADRC Regions are in different phases of development with all nine projected to have approved plans and active service collaborations by late 2014, early 2015.

Year One Grant Dynamics in Oregon, cont'd. 2



- Each region identifies a lead AAA to act as fiscal agent for regional funds and to convene the team.
- The team for the Portland Metro ADRC Consortium is the region's Governing Board and makes all decisions regarding work plan development, scope of work, budgeting and division of duties among the members.

Metro Portland ADRC Development



- The Portland Metro ADRC Consortium is comprised of the Area Agency on Aging (AAA) Directors from the four counties, the local CIL Director (Barry Fox-Quamme) and the Director of Aging & People with Disabilities (APD) for the lead fiscal agent, i.e., Multnomah County.
- Each director has an equal seat on the governing board, and the board has successfully achieved consensus, so far, in plan development and allocation of funds.

Metro Portland ADRC Development, cont'd.



- The Metro ADRC Consortium created an Operations Advisory Council that includes consumer reps from each of the governing board agencies, community stakeholders and support staff from our respective agencies.
- The intent of grant funds is to leverage the creation of a connection between the partners. Initial funding was directed at infrastructure development, not direct services.

Metro Portland ADRC Development, cont'd. 2



- The Portland Metro ADRC Consortium has directed about \$45,000 a year in available funds toward ADRC marketing and outreach and training for CIL and AAA/APD staffs.
- Metro ADRC has taken out ads in community newspapers to promote awareness of ADRC in local communities, as well as in culturally specific populations

CIL Initiatives within Metro ADRC Development



- ILR has joined the Association of Information & Referral Specialists (AIRS) and five staff members became AIRS Senior Certified by passing exams in June 2013.
- The same ILR staff members also completed Level One and Level Two Options Counseling training in 2013 offered by the State Unit on Aging.
- Obtaining these certifications now allows ILR to subcontract with the county to offer Options Counseling for people with disabilities and to eventually be a CMS subcontractor should Options Counseling become a CMS approved service.

CIL Initiatives within Metro ADRC Development, cont'd.



- ILR is also contracting to provide on-going training for AAA and APD staff on the History of the Independent Living Movement, and person-centered/person-directed planning. The value of peer services will also be emphasized.
- Trainings will reach most AAA and APD staff, along with allied community partners, in 2014-2015 and then be repeated twice a year for new hires into these systems.
- These forms of staff development have engaged CIL staff with AAA/APD staff and begun a cultural dialogue between the senior and disability service sectors.

Statewide ADRC Development of the Nine Regions



- Statewide dynamics across the other 8 ADRC Regions during year one have seen development of governing boards, work plans, and partnerships at various levels.
- About half of the regions are well-established and the other half is still finalizing their first work plans.
- While CILs are mandated to be members of the governing boards, CILs are not active in all of the ADRC Regions.

Statewide ADRC Development of the Nine Regions, cont'd.

- Some rural ADRC Regions initially established sole AAA management of the ADRC initiative and didn't bring partners into active participation in the governing boards.
- Having all of the parties at the table to connect Aging and Disability Services through ADRC is the goal that is being realized to varying degrees.

Questions?

Year Two Dynamics of ADRC Development in Oregon



- As Oregon ADRC approached the second year of the grant, steps were taken to convene the entire nine-region network of AAA and CIL directors.
- The goal was to engage parties in a training and dialogue around partnership models for more robust collaboration.
- A two-day session took place in early October 2013 and resulted in new levels of insight and collaboration. We are moving toward a model of greater transparency regarding work plan development, budgeting, and use of new funds.

Year Two Dynamics of ADRC Development in Oregon, cont'd.



- We plan to convene this statewide group at least once a year going forward to maintain enhanced levels of regional collaboration.
- Year two work plans will have a more specific expectation that CILs will be on the governing boards and be active recipients of funding, whenever possible.

Year Two Dynamics of ADRC Development in Oregon, cont'd. 2



- Year one laid a strong foundation for legislative advocacy.
- Significant new funding was secured for expanded services.
- Expanded direct services are funded for 2014-2015 biennium across the ADRC network of partners.
 - Options Counseling: \$1.4 million statewide
 - Mental Health Services: \$1.8 million statewide
 - Gatekeeper Program: \$1.7 million statewide

Year Two Dynamics of ADRC Development in Oregon, cont'd. 3



- For the Metro ADRC Consortium, these expanded funds would traditionally flow to the AAAs and by-pass the CIL.
- As a result of the CIL's participation in the ADRC partnership, the AAA funding allocation formulas are now being re-designed to include an ADRC funding factor that will now value people with disabilities in the ADRC Region.
- The population of people with disabilities is now being valued side by side with the aging population to create this new allocation formula.

Year Two Dynamics of ADRC Development in Oregon, cont'd. 4



- As a result, ILR expects to receive a significant minority share of these funds to enhance our services for consumers from these funding areas.
- ILR projected about 20% of new funds would go to ILR in the Metro ADRC Region ~ a range of \$40,000 to \$60,000 from each of these three funding sources, and perhaps more for Options Counseling if CMS approved in the future.

Year Two Dynamics of ADRC Development in Oregon, cont'd. 5



Initial allocations of new State General Funds for 2014:

Options Counseling - \$98,000 to ILR for over 15 months

Gatekeeper Program – No funds to ILR, although an openness to ILR interfacing with the existing Gatekeeper training program to advise AAA Trainers on how to incorporate a disability perspective

Mental Health – A decision was made to solicit non-AAA vendors to offer an evidence-based service model for seniors and people with disabilities. ILR will compete.

Questions?

Contact Information

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Wrap Up and Evaluation

Please *click the link below* to complete your evaluation of this program:

<https://vovici.com/wsb.dll/s/12291g56182>

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