

Intersecting Activities and Initiatives Related to Financing of Long-term Services and Supports

The Long-term Care Financing Advisory Committee (Advisory Committee) is tasked with identifying strategic options for financing long term services and supports (LTS) for people with disabilities and elders in Massachusetts. The Advisory Committee is one of a number of activities outlined in Massachusetts’ Community First Olmstead Plan, which provides a vision and action plan reflecting the Governor’s commitment to ensuring that people with disabilities and elders have access to community living opportunities and LTS that address each individual’s diverse needs, abilities and background.

While discussing financing options, the Advisory Committee concluded that there are many interconnected issues outside the scope of the Committee’s work that affect an individual’s ability to choose community living. Other Olmstead plan activities and initiatives that address these issues are in process across the Commonwealth. Activities in the following issue areas are described below: affordable and accessible housing; employment; workforce capacity and development; transportation; integrated financing and care delivery; administrative activities; public awareness and access to information; and consumer choice. The Advisory Committee endorses these activities and further work in these areas, and recognizes the importance of their success to the realization of a reformed financing system for LTS that furthers the Commonwealth’s Community First goals.

Affordable and Accessible Housing

Increased availability of affordable and accessible housing is necessary for people with disabilities and elders to live independently in their own communities. Community First initiatives seek to increase the availability of accessible and affordable housing, raise awareness about these options among housing providers and the public, and promote home modification loans to help people remove barriers to accessibility within their own homes.

Activity	Responsible Party	Description
Housing Summit and related training forums	Systems Transformation Grant (STG) Housing	A Housing Summit, which occurred in late October 2009, brought together a diverse group of individuals including

	Subcommittee	developers, architects, service providers, advocates, and consumers to talk about existing innovations in housing and generate solutions to increase affordable, accessible housing given the challenging financial times. This Summit was preceded by four fair housing training forums that provided education and fostered collaboration on universal design, legal issues, and best practices in housing and housing search.
Housing Search Guide	STG Housing Subcommittee	A housing assessment tool is being created to assist housing search workers and consumers in their efforts to locate accessible and affordable housing statewide.
EOHHS Cross-Agency Housing Workgroup	Executive Office of Health and Human Services (EOHHS), Department of Developmental Services (DDS), Department of Housing and Community Development (DHCD), Department of Mental Health (DMH), Department of Mental Health (DPH), Executive Office of Elder Affairs (EOEA), Mass Commission for the Blind (MCB), Mass Commission for the Deaf and Hard of Hearing (MCDHH), Mass Rehabilitation Commission (MRC)	This workgroup meets regularly to discuss and work on cross-agency housing initiatives. Current projects include: 1. A project that will quantify and map the current locations of permanent housing units servicing EOHHS populations and funded by state and federal sources. Once completed, this can be used to locate areas of need for developers to site. 2. A cross-agency effort to create an overarching comprehensive housing policy to address the varied housing needs of EOHHS consumers. 3. A project in which EOHHS is working with DHCD on HUD NOFAs (notice of funding availability) to ensure that EOHHS has input into the process.

Outreach regarding Home Modification Loan Program	MRC	Outreach was conducted to consumers, providers and housing authorities on the Home Modification Loan Program through media, trainings, and conferences. Outreach is ongoing.
MassAccess Housing Registry expansion	Citizens’ Housing and Planning Association (CHAPA)	The expanded MassHousing Registry was launched, an outreach campaign was implemented and continued efforts are occurring. CHAPA also hired a consultant to look at various accessibility codes. The results of this effort will be released soon.
American Recovery and Reinvestment Act (ARRA) funds for housing development	DHCD	Eight developments have been funded by the ARRA in Beverly, Boston, Framingham, Greenfield, Holliston and Springfield. These projects were stalled due to lack of equity available in the low-income housing tax credit market. Thirteen units will be made available to people with disabilities who are transitioning from nursing homes and other institutional settings or at risk of institutionalization, and thirteen units will be made available to people with mental health disabilities.

Employment

Increased employment opportunities, with essential supports, training, and accommodations, are crucial for people with disabilities and elders seeking to fully participate in their communities, achieve economic independence, and contribute to the financing of long-term supports and services (LTS). Community First initiatives seek to increase access to gainful employment, job training, and career and benefits planning for people with disabilities and elders.

Activity	Responsible Party	Description
Massachusetts Model Employer Initiative	Disability Taskforce on Employment ¹	A strategic plan was released in June 2009 for making MA a model employer for people with disabilities. The over-arching goals are to: seek to increase the number of people with disabilities employed by the Executive Branch; explore methods to ensure the successful retention and promotion of state workers with disabilities and older workers who age into disability; foster an environment and a workforce able to support and facilitate the employment of people with disabilities. The Task Force developed two dozen objectives to achieve these goals.
Activities related to Vocational Rehabilitation (VR) services and case management supported by the ARRA	MRC	Funds will be used for creating a web-based application for vocational case management. Marketing materials will be created to promote job opportunities for people with disabilities. Funds are also being used for an overall redesign of VR services.
Training, counseling and paid community service assignments to low-income elders aged 55 and older	Senior Community Service Employment Program at EOEA	Low-income individuals age 55 and older are placed in temporary assignments to gain work experience and training. Participants are paid minimum wage for 20 hours per week.
Work Without Limits initiatives	MI-CEO grant, EOHHS, Executive Office of Labor and Workforce Development	The Work Without Limits Initiative (formerly the MI-CEO grant) is a public/private partnership bringing together families, policy researchers, policy makers, service planners, employment service providers, employers, and other stakeholders. The vision of the initiative is “to create an environment in which youth and adults with disabilities can achieve economic well-being and community inclusion through full

¹ Members of the Disability Taskforce on Employment include staff from EOHHS, MRC, the Office of Diversity and Equal Opportunity, Executive Office of Public Safety and Security, Human Resources Division, Massachusetts Office on Disability, Executive Office of Education, and the Massachusetts Developmental Disabilities Council.

		<p>participation in the competitive workforce.” They identified eight strategic priority areas including: communicating a pro-employment message to all stakeholders, empowering people with disabilities to fully participate in employment, effectively engaging businesses and employers, enhancing the employment services delivery system, ensuring access to work incentives and benefits information, strengthening the CommonHealth Working Program and other MassHealth services that promote employment, increasing transportation options, and tracking employment outcomes.</p>
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Workforce Capacity and Development

A high-quality, stable, and well-trained workforce must be available to deliver the home and community-based services that allow people with disabilities and elders to live with dignity in their own communities. Community First initiatives seek to build and sustain the LTS workforce through improving recruitment and retention strategies, offering on-going training, and providing opportunities for career advancement.

Activity	Responsible Party	Description
<p>Identify and recommend mechanisms for increasing and sustaining paraprofessional and professional LTS workforce</p>	<p>EOHHS</p>	<p>In 2009, a summer intern completed a preliminary scan of current workforce development activities occurring in almost all agencies that provide some level of LTS services. Further synthesis of information is needed to understand potential for improved cross-agency learning and collaboration. EOHHS has identified itself as a strategic partner in a US Department of Labor Grant focused on LTC Workforce Development, which Commonwealth Corporation applied for on behalf of the Commonwealth.</p>
<p>Enhance and expand</p>	<p>Co-chaired by EOEA</p>	<p>This workgroup has been charged with exploring ways the programs and</p>

workforce capacity building for home care aides in MA	and Mass. Council for Home Care Aide Services	services offered through the Aging Services Access Points (ASAP) network can allow for consistent scheduling of home care aides. The group will work with EOEA to explore how clustering models can be adapted, enhanced, and expanded throughout the ASAP network.
Implement PCA Directory and provide recommendations on how to improve PCA training and PCA workforce development and stabilization.	PCA Workforce Council	The statutory mandate of the Council is to insure the quality of long-term, in-home, personal care by recruiting, training and stabilizing the work force of personal care attendants. To achieve these goals the Council has: created a web based directory with a searchable database, bargained with the union to establish a 3 year contract with wage increases for each year, commissioned surveys of both consumers and PCAs and provided limited funding to community colleges to offer free CPR and first aid training to PCAs.
Increase the American Sign Language (ASL) interpreter workforce	William Hoy Council of Deaf Studies and Workforce Development	This Council is charged with establishing guidelines for a grant program for new or continued Deaf Studies and ASL interpreting programs, developing guidelines for a scholarship fund for students and marketing and outreach efforts.

Transportation

Affordable and accessible transportation, both public and private, must be available to ensure that people with disabilities and elders can work outside of their homes, access community-based services, and fully participate in community life. Community First activities support evaluation of the current transportation infrastructure and seek to improve coordination of transportation initiatives across local communities.

Activity	Responsible Party	Description
Evaluation of current human service transportation brokerage system	EOHHS Human Service Transportation Office (HST)	HST received a federal New Freedom grant to evaluate the current brokerage system for human service transportation and identify whether it could be a model for broader implementation.
Inventory current mobility management practices across the Commonwealth	HST	HST applied to receive a United we Ride grant that will allow them to evaluate mobility management practices across the Commonwealth by doing an inventory of what services are currently available in the community. Mobility management is an approach for delivering and managing transportation services that focuses on meeting the individual transportation needs of elders and people with disabilities by coordinating services through a wide range of transportation options and providers.
Massachusetts Institute for Transportation Coordination	HST, Work Without Limits	The Massachusetts Institute for Transportation Coordination recently hosted a 3-day workshop for collaboratives of locally based entities to develop plans on better coordination of transportation in regional areas.

Integrated Financing and Care Delivery

An integrated health care delivery system that coordinates medical care and non-medical LTS for people with disabilities and elders is necessary to reduce administrative burden, rationalize payment policies, improve the quality of care and contain costs. Community First initiatives support efforts to improve care coordination for people with chronic care needs and people who are eligible for both Medicare and Medicaid (i.e. “dual eligibles”) through system-wide innovations, such as payment reform and implementation of programs that support high quality and patient-centered primary care.

Activity	Responsible Party	Description
Transforming Care for Dual Eligibles Initiatives	MassHealth, EOHHS, EOEA	<p>Integrated Care: Technical assistance is being provided by the Center for Health Care Strategies to evaluate options for the next generation of integrated care in order to: increase access so all dual eligibles in MA will have access to benefits of integrated care; provide additional and different integrated care models that dual eligibles can voluntarily choose based on individual needs and personal preferences; and build from MA's years of experience and knowledge with integrated care programs. The initial option being explored is a voluntary fully capitated integrated care model for adults with disabilities. Future consideration will be given to a primary care case management (PCCM) model as an alternative integrated care model for dual eligibles of all ages.</p> <p>Integrated Financing: The Commonwealth is seeking a new financing mechanism that combines Medicare and Medicaid funding for dual eligibles at the state level.</p>
Massachusetts Patient-Centered Medical Home Initiative	MassHealth	The mission of this initiative is to design and implement a system to support high-performing, patient-centered primary care delivery across the Commonwealth of MA. The goal is to transform all primary care practices into high-performing, advanced medical homes by 2015.
Statewide Payment Reform for All Payers	Special Commission on the Health Care Payment System	Recommendations from this Commission include Global Payment approaches and the implementation of the medical home model, which is intended to offer patient-centered care that is accessible, continuous, coordinated and comprehensive. Recommendations are to transition to global payment within a five year timeframe while providing infrastructure support, including technical assistance and information technology, to providers.

<p>SCO programs</p>	<p>MassHealth</p>	<p>Senior Care Options (SCO) is a MassHealth program for individuals 65 years and older. This voluntary program is a comprehensive, coordinated health plan that covers all of the services reimbursable under Medicare, MassHealth and the Frail Elder Home and Community Based waiver, where applicable, through a senior care organization and its network of providers. Each member develops a plan of care to address their needs with a team including their primary care physician, nurses, specialists and a geriatric support services coordinator.</p> <p>Outreach efforts are ongoing to all potential SCO enrollees across the Commonwealth. They include postcards to all categorically eligible members age 65 and over (rate of 4000/month) and birthday card mailings to current MassHealth members who are about to turn 65 (rate of ~ 200/month). Both cards instruct members to call the MassHealth SCO line for assistance in obtaining additional information about and from the Senior Care Organization(s).</p>
<p>PACE programs</p>	<p>MassHealth</p>	<p>The Program of All-inclusive Care for the Elderly (PACE) is a comprehensive medical and social service plan for frail elders aged 55 years and older. The program provides coordinated care by doctors, nurses, aides, therapists, social workers, nutritionists and other medical and social service providers. Family caregiver support is also provided.</p>

Administrative Activities

Improvements in the LTS system’s administrative infrastructure can contribute to the Commonwealth’s ability to ensure quality, coordinated care for people with disabilities and elders. Community First initiatives seek to increase the usage of Health Information Technology (HIT) and develop capacity for information exchange.

Activity	Responsible Party	Description
Increased usage of Health Information Technology	Massachusetts E-Health Institute (MeHI) and the Health Information Technology Council (HIT)	The Massachusetts eHealth Institute (MeHI) and the HIT Council are charged, through Chapter 305 of the Acts of 2008, with ensuring that all providers have and utilize electronic health records (EHRs) and interoperable networks by January 1, 2015.
Support adoption of electronic health records and develop capacity for information exchange	MeHI and HIT	The HITECH Act provisions of the American Reconciliation and Recovery Act (ARRA) of 2009 fund efforts to support the adoption of meaningful use of interoperable EHRs and to develop the capacity for widespread health information exchange.

Public Awareness and Access to Information

Many elders and people with disabilities remain unaware of home and community-based options for receiving LTS. Likewise, many health care providers and other clinicians also are unaware about options for community-based care. Community First initiatives seek to increase access to information about LTS and support peoples’ planning for future LTS needs. Additionally, these initiatives raise awareness about community-based care among the public and providers through local drop-in centers, informational hotlines, brochures, videos, and web-based resources.

Activity	Responsible Party	Description
Development of MADIL	EOHHS	The Massachusetts Aging and Disabilities Information Locator (MADIL) is a web-based community resource directory which pulls information from 1-800-Ageinfo, New England Index, and the MassAccess Housing Registry. Work continues on outreach on this tool.
1-800-Ageinfo updates	EOEA	800AgeInfo.com was revised and posted to a new platform.
Aging and Disability Resource Consortia development	EOEA and MRC	The MA Aging & Disability Resource Consortia formalizes relationships among Independent Living Centers (ILCs) and Aging Services Access Points (ASAPs) as the core ADRC partners across the Commonwealth. There are 11 ADRCs operating in various stages of development, affording MA statewide coverage of ADRCs. In addition to the provision of information, referral & assistance, ADRCs provide individuals of all ages and disabilities with options counseling, streamlining access to publicly-funded LTS, and working to provide future planning for individuals not yet eligible for Medicaid. The MA “no wrong door” model means that regardless of which agency a consumer contacts that agency will be able to provide information, referral and access regardless of the caller’s age or disability.
Long-term Care Options Counseling development	EOEA and MRC	The Long Term Care Options Counseling Program, administered by EOEA and MRC, provides information and decision-support to elders and individuals with disabilities to assist them in determining the services and settings that best meet their long term support needs. Counselors provide information about community and institutional services, information about resources to help pay for services, relevant referrals, and assistance in connecting with resources if needed. The supportive framework for the Massachusetts model is provided by MGL, Chapter 211 of the Acts of 2006 in concert with the Commonwealth’s Community First Policy and

		<p>the current capacity and strengths of the community support system. Program activity is being tracked through the SAMS and IDMS databases which have been modified to include fields specific to the LTCOC program. The LTCOC Program is being tested in 3 regions of the state by well-established ADRCs: Metrowest ADRC, ADRC of the Greater North Shore and ADRC of Merrimack Valley.</p>
Creation and dissemination of Long-Term Care Guide	MA Division of Insurance	<p>The Division of Insurance updates and disseminations the report “Your Options for Financing Long-Term Care: A Massachusetts Guide.” This tool helps people understand financing options and provides the necessary information to make educated decisions about products.</p>
Long-term Care Awareness Campaign	EOHHS, EOEA, Consumer Affairs and Business Regulation, UMMS/OLTSS	<p>Beginning in January 2010, Massachusetts Long-Term Care Awareness campaign materials will be mailed to a targeted group of residents aged 45-59 and made available to anyone upon request and through 1800Ageinfo.com. The campaign is designed to give information to middle-aged and older adults to help them plan for their future long-term supports needs.</p>
PCA referral directory launched	PCA Workforce Council and Rewarding Work Resources, Inc.	<p>The PCA Workforce Council launched a web-based PCA directory (www.mass.gov/findpca) to assist people with ADL needs in locating personal care assistants. This service is free to all people who qualify for the MassHealth PCA program and is available to everyone for purchase. Statewide outreach is in progress. A public service announcement is airing on television and cable stations and postcards, brochures and posters have been produced and distributed.</p>

Long-term Supports and Services educational video	Systems Transformation Grant	A video project is near completion that will promote awareness and provide information about home and community-based services. The target audience for video is policymakers including legislators and executive staff.
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Consumer Choice

Promoting consumer choice around LTS allows elders and people with disabilities to live more independently in their own communities. Community First initiatives encourage person-centered planning about long term care to help people make informed choices about what services they need and where they can access these services.

Activity	Responsible Party	Description
Training/Self-Direction Report	EOHHS/Person Centered Planning Implementation Grant	Last year, the Person Centered Planning Implementation Grant team along with the STG Diversion Subcommittee issued a report on self-direction across EOHHS with recommendations for increasing self-direction in each agency and across the Secretariat. Since this time, several agencies, including DMH, DDS, MRC, MCB, MCDHH and EOEA, have started to train case managers, consumers and providers. Jeff Keilson, from the Grant team, held trainings for over 150 staff and individuals who are deaf and have intellectual disabilities, developmental disabilities and/or psychiatric disabilities, and elders. Specific facilitator trainings occurred for DMH, MCDHH, Bay Path Elder Services and staff from Advocates, Inc. Additional training is scheduled for MCB and MRC in November. A person centered planning framework was developed with input from the agencies that is available for use and a toolkit is in the process of being created for all agencies to use.

Integration of person-centered planning into program design	EOHHS agencies	Activities are underway to integrate person-centered planning into EOHHS program design. Examples include: ABI waiver program, TBI waiver program, DDS waiver redesign, and all DMH services.
Enhanced Community Options Program (ECOP) Pilot at Bay Path	EOEA	Bay Path Elder Services is currently piloting an ECOP program that allows elders to self-direct an individual budget of approximately \$600-\$800 per month. All expenses must be spent on services or supports related to five quality of life areas. Individuals have the ability to plan for the year by having the flexibility to spend over their monthly budget by borrowing from another month. There are two case managers working with the individuals in the program.
Consumer Directed Care option within Home Care Basic Non-Waiver and ECOP Non-Waiver programs	EOEA, ASAPs	Beginning August 2009, elders within the Home Care Program can opt to exert greater control over the provision of personal assistance services by choosing the option to hire, manage and dismiss their own workers.

Conclusion:

The Long-term Care Financing Advisory Committee has a vision for a LTS financing system that addresses the LTS needs of all people in the Commonwealth. The system will ensure a strong public safety net for the poor and most vulnerable, limit financial pressure on the state financing system so that state funds are preserved for those most in need, encourage personal responsibility for financing LTS to the extent possible, enable middle income people of all ages to access LTS without becoming impoverished, and ensure participation of and support for informal caregivers. A system that spreads

the responsibility of financing LTS will help people to gain economic self sufficiency, allow people to remain in their homes and communities, and contribute to overall system sustainability.

The Advisory Committee recognizes that the Commonwealth's goal of shifting LTS to community settings will not be met through improved financing alone. Successful implementation of the Advisory Committee's recommendations is contingent upon the realization of related initiatives that promote accessible jobs, housing, and transportation for people with disabilities and elders. A reformed LTS financing system also depends on a well-trained and professional direct care workforce, improved coordination of care for people with high health care needs, an accessible administrative infrastructure that benefits from the latest technologies, and a well-informed public that is empowered to make health care decisions for themselves and their families.

Therefore, the Advisory Committee endorses the following initiatives and activities that support its core principles:

- Increasing the availability of affordable and accessible housing;
- Promoting employment of people with disabilities and elders; encouraging the state to lead this effort by becoming a model employer;
- Promoting a high-quality and stable direct care workforce;
- Increasing the availability and coordination of local transportation options for people with disabilities and elders;
- Supporting a care delivery system that coordinates services and integrates financing for LTS;
- Enabling more effective care coordination through infrastructure improvements that expand usage of health information technologies and build capacity for information exchange;
- Promoting public and provider awareness about LTS and planning for future LTS needs; ensuring that all information about LTS is available in accessible formats for elders and people with disabilities;
- Increasing consumer choice in the LTS delivery system.

The Long-term Care Financing Advisory Committee acknowledges that while all of these initiatives are necessary to reform the current system of LTS, further work still remains to fully realize the goals of Community First. The Advisory Committee endorses further innovation and planning to craft a sustainable LTS system that empowers people with disabilities and elders to live with dignity and fully participate in community life.