

April 2008



# Vermont Choices for Care Evaluation: Technical Assistance First Bi-Annual Report Final Version

**Prepared by:**

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collaboration with the Vermont  
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## Introduction

The contract between the Center for Health Policy and Research (CHPR) and the Vermont Department of Aging and Independent Living (DAIL) for the evaluation of Choices for Care (CFC) waiver includes a number of technical assistance (TA) activities. Over contract year 2007-2008, the contracted activities include monthly TA teleconferences, quarterly meetings and five policy memos addressing eligibility, enrollment, assessment/service authorization, service delivery and quality management topics.

This report is the first bi-annual TA activity report summarizing CHPR's TA activities from June 2007 to January 2008.

## Evaluation Kick-Off Meeting

On June 22, 2007, DAIL, CHPR, and University of Vermont (UVM) staff (subcontractor to CHPR) met in Waterbury, Vermont, in order to discuss various issues pertinent to the evaluation and kick-off evaluation activities. Discussions encompassed the history of the CFC waiver, current challenges and progress, and CFC main data sources (e.g., SAMS, OMNIA and MMIS). Meeting attendees also finalized methodology for the focus groups with participants, family members, and providers. CHPR staff learned about DAIL's priorities for the evaluation and CHPR shared ideas for the evaluation of the CFC waiver for the first contract year. Some of the outcomes/topics that DAIL outlined as priorities for the evaluation were:

- Educating Vermonters on LTC insurance
- Improving awareness of LTC options for CFC participants
- Individual choices are supported
- Eligibility and service approval are equitable and understood by consumers and providers
- CFC participants are aware of the Flexible Options
- Cost effectiveness issues
- Nursing home bed occupancy
- New quality improvement procedures

## Monthly TA Teleconferences

Teleconferences between CHPR evaluation staff and CFC implementation staff have taken place monthly since March 2007 (with the exception of November 2007 and January 2008). These calls allowed CHPR and DAIL to coordinate evaluation activities and for CHPR to provide technical assistance to DAIL regarding the evaluation of the CFC waiver. The monthly TA calls have included CHPR staff -- Dee O'Connor (principal investigator), Emma Quach (project director) and Jennifer Ingle (project associate). In addition, other CHPR researchers, Judy Savageau, Wen-Chieh Lin, and Christine Clements have participated on calls that pertained to their areas of expertise, e.g., qualitative and quantitative methodologies. DAIL staff on these calls have included Bard Hill, Lorraine Wargo, Joe Carlomagno, and Adele Edelman.

Topics discussed during TA teleconference have been:

- Focus groups with families, consumers, and providers—development of selection criteria and focus group guide
- Interviews with state staff and advocates—development of selection criteria and interview guide
- Potential merged data analysis plan, e.g., through ASPE funding
- Discussions regarding Vermont database capacities
- Addition of questions to and modifications to the ORC Macro Consumer Survey
- Draft evaluation plan and evaluation roundtable planning
- Discussions of the Eligibility Policy Memo, including a teleconference with DCF staff, Robert Mollica (long-term care expert at National Academy of State Health Policy), DAIL staff, and CHPR.

CHPR provided knowledge-based technical assistance to DAIL as part of the discussions of the topics outlined above, particularly on the addition of questions to the ORC Macro Consumer Survey, the development of the draft evaluation plan and the memo on CFC eligibility policies.

### **ORC Macro Consumer Survey Questions**

In order to capture additional data regarding knowledge of program participants and other Vermonters of LTC options and assess the degree to which they feel they have choice in their LTC settings, CHPR suggested that several questions be added to the ORC Macro survey. Adding these questions will help to triangulate data collection for evaluation questions pertaining to knowledge and choice/preference questions in the evaluation plan. Additionally, CHPR recommended that the response categories to some questions on the survey be revised in order to ensure that the responses are mutually exclusive.

### **Policy Memos**

An Eligibility Policy Memo was drafted by CHPR evaluation staff as part of the TA activities defined in the contract. The memo is currently being finalized and will be shared with DAIL Advisory Board members at their upcoming meeting in April 2008. The Eligibility Memo was the first in a series of five memos (as noted above), which will provide technical assistance by analyzing DAIL policies and procedures affecting the waiver implementation and offering recommendations for possible improvements. For example, the eligibility memo offers recommendations that may aid in faster financial eligibility determinations. The Eligibility Memo addressed operational policies and procedures affecting participant clinical and financial eligibility for the CFC waiver. The memo recognized the progress made regarding eligibility processes and also suggested areas for further development.

CHPR will continue to work with DAIL on focusing the content of future policy memos.

### **Evaluation Activities**

A main focus of CHPR's activities for this contract year has been the development of the evaluation plan for CFC. The following activities took place between June 2007 and December 2007 that helped inform the draft evaluation plan or were directly related to the evaluation plan draft.

- Interviews/focus groups with five groups (state staff, providers, advocates, consumers and family) for the process evaluation
- Logic model, evaluation plan outline, and draft evaluation plan
- Evaluation roundtable that gathered expert input and feedback on the draft evaluation plan
- Eligibility Memo drafts

### **Upcoming TA Activities**

CHPR and DAIL staff are planning a meeting with the DAIL Advisory Board in to further discuss the evaluation plan, to obtain additional feedback, and to disseminate the Eligibility Memo. This meeting is scheduled for April 10<sup>th</sup>, 2008.

### **Conclusion**

CHPR will continue to hold monthly teleconferences with DAIL staff in order to discuss on-going evaluation activities and technical assistance tasks. In this first contract year, CHPR and DAIL have worked together to accomplish the evaluation and TA activities outlined above and this partnership will continue in upcoming activities.

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