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

Prepared by:

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(CHPR) Long Term Care Policy Unit in
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 Disabilities, Aging and Independent Living (DAIL) for the evaluation of the Choices for Care (CFC) waiver includes a number of technical assistance (TA) activities. Over contract year 2007-2008, the contracted activities included monthly TA teleconferences, in-person quarterly meetings and policy memos or briefs.

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

Monthly TA Teleconferences

A number of teleconferences took place between January 2008 to June 2008. These calls allowed CHPR and DAIL to coordinate evaluation activities as listed in the contract and for CHPR to provide technical assistance to DAIL regarding the evaluation of the CFC waiver. Core participants in these calls were CHPR evaluation staff, DAIL staff and, occasionally, CHPR consultants. Specifically, these TA calls included CHPR staff -- Dee O'Connor (principal investigator), Emma Quach (project director) and Jennifer Ingle (project associate). In addition, CHPR consultants, 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. From January 2008 to June 2008, DAIL staff on these calls have included Bard Hill (Information and Data Unit Director) and Adele Edelman (waiver manager).

CHPR provided knowledge-based technical assistance to DAIL as part of the discussions of the topics outlined above, particularly on evaluation work regarding the applicant list, the development of the draft evaluation plan and the memo on CFC enrollment activities. Topics discussed during TA teleconferences included the following:

- Scope of evaluation plan and relative feasibility of specific activities under the plan
- Data collection for evaluation plan activities. These included data for applicant list evaluation activities such as SAMS data and the availability of other data such as ILA, Macro survey data and sources for complaints data that would help answer various questions posed in the evaluation plan.
- Process for obtaining feedback of evaluation plan from DAIL Advisory Board

- Finalization of the Eligibility Policy Brief and discussions regarding Enrollment Policy Brief
- Development of tool for tracking status of individuals on high needs waiting list
- Discussion and edits to other contract deliverables such as the Qualitative Interviews Report and Data Summary Report
- Discussion of prioritization of implementation of specific components of evaluation plan

Eligibility and Enrollment Policy Briefs

An Eligibility Policy Brief was drafted by CHPR evaluation staff as part of the TA activities defined in the contract. The memo has been finalized and was shared with DAIL Advisory Board members on April 10th 2008. The Eligibility Brief analyzed DAIL eligibility policies, criteria, and procedures in terms of timeliness and creation of equal access to community settings and nursing homes. This Brief also made recommendations for possible improvements.

The Enrollment Policy Brief, the second policy brief, focused on enrollment procedures and policies for the high needs waitlist, which was reinstated on February 1st 2008. In particular, this Brief focused on the potential impact on those in the high needs group placed on the waiting list. DAIL recently reviewed the Enrollment Policy Brief and CHPR is in the process of finalizing the Brief.

Evaluation Plan Development

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 January 2008 and June 2008 which helped inform the draft evaluation plan or were directly related to the evaluation plan draft.

- Evaluation roundtable that gathered expert input and feedback on the draft evaluation plan
- Development of a full evaluation plan outlining short-term and long-term outcomes and approaches to measuring CFC's achievements in relation to each outcome
- Development of proposed questions for consideration in conducting evaluation activities related to the waiting list and moderate needs group analysis

- Development of a waiting list tracking form for proposed use by case management agencies to collect information on what happens to individuals while they are on the high needs waiting list

Evaluation Roundtable Meeting

On January 17-18, 2008, CHPR hosted an evaluation roundtable meeting which provided an opportunity for key DAIL leadership to receive an overview of the proposed evaluation activities and to discuss them with the full CHPR evaluation team. CHPR also invited five national long-term care experts and two Vermont stakeholder representatives to participate in this discussion, thus assuring DAIL that the proposed evaluation would address issues of concern to Vermont stakeholders and issues of national importance in evaluating long-term care programs. During the evening between the two workday sessions, CHPR arranged for Brian Burwell, director of the CMS Long-Term Care Awareness Campaign, to provide an overview of the campaign for the Vermont participants.

Advisory Board Meeting and Provider Call Feedback

CHPR attended the DAIL Advisory Board meeting on April 10th to describe the draft evaluation plan and to obtain feedback from Board members of the evaluation plan. Feedback was subsequently incorporated into the evaluation plan.

In addition to obtaining feedback from Board members, CHPR conducted a teleconference with additional providers in order to gain their feedback about the evaluation plan. This teleconference took place on March 31st, 2008. Representatives from Area Agencies on Aging (AAAs), the PACE program, Coalition of Vermont Elders (COVE) and Vermont Legal Aid attended the call. Representatives provided valuable perspectives on aspects of the evaluation questions included in the plan. CHPR will elicit stakeholder feedback on the evaluation plan and evaluation results in future years as agreed upon with DAIL.

Conclusion

CHPR will continue to hold teleconferences at least every other month (or as necessary) with DAIL staff moving into the next contract year in order to conduct evaluation activities and technical assistance tasks as stated in the year two contract. 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 as the scope of the work for the next contract year is finalized.

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