Integrating Participant Direction in the Aging Network:
Tools and Strategies for Culture Change

n4a 2010 Annual Conference

July 20, 2010
Welcoming Remarks

Lori Gerhard
Director, Office of Planning & Policy Development
AoA
Session Overview

- Learning more about you....
- Environmental changes affecting the operations of the Aging Network
- Dynamics of changing organizational culture
- Additional tools and resources to get you started
Learning More About You…

Casey Sanders
Assistant Director of Training
NRCPDS
How did you get to n4a?

1. Car 24%
2. Train 3%
3. Plane 72%
4. Other 0%
Who is in the audience?

1. Federal Agency
2. SUA
3. AAA
4. Other
What is your job title?

1. Director
2. Program Manager
3. Case Manager/ PD Counselor
4. Other

- Director: 43%
- Program Manager: 27%
- Case Manager/ PD Counselor: 3%
- Other: 27%
Environmental Changes Affecting the Aging Network

Lori Gerhard
Director, Office of Planning & Policy Development
AoA
Environmental Changes Affecting the Aging Network

- Today’s Environment
  - Aging of the population
  - Increasing demand for home and community-based services (HCBS)
  - Constraints in public funding

- Opportunities
  - Affordable Care Act
    - ADRC Expansion
    - CLASS Program Implementation
    - Expansion of Participant-Directed Care
Rate your level of knowledge about ADRCs

1. Expert
2. Advanced
3. Intermediate
4. Beginner
Is your agency administering a participant-directed program?

1. Yes
2. No
3. In the near future
4. N/A
Are you administering a Cash & Counseling option in your OAA programs?

1. Yes
2. No
3. N/A
Are you administering a Cash & Counseling option in your state-funded programs?

1. Yes
2. No
3. N/A
Are you administering a Cash & Counseling option in your Medicaid programs?

1. Yes
2. No
3. N/A
Are you administering a VD-HCBS program?

1. Yes
2. No
3. N/A
Are you currently working with a FMS?

1. Yes  
2. No  
3. In the near future  
4. N/A
Prevalence of Participant Direction: 1970’s
Prevalence of Participant Direction: 1980’s
Prevalence of Participant Direction: 1990’s
Prevalence of Participant Direction: 2000’s
Interactive Activity

Casey Sanders
Assistant Director of Training
NRCPDS
Thumb Wrestling
Dynamics of Changing Organizational Culture

Mark Sciegaj
Senior Training Consultant
NRCPDS

Casey Sanders
Assistant Director of Training
NRCPDS
Promoting Culture Change in the Aging Network

- Traditional Agency Model
- Participant-Directed Model
Challenges of Culture Change

Organizational transformation cannot occur without a combination of individual change from within and systemic support from the outside.
What is the primary inhibitor to the expansion of participant direction?

1. Leadership buy-in
2. People implementing the change aren’t involved in developing the change
3. Lack of understanding and knowledge
4. Lack of effective ongoing communication

19%  38%  38%  4%
Regarding participant direction, how important is leadership buy-in?

1. Very Important - 91%
2. Important - 9%
3. Moderately Important - 0%
4. Of Little Importance - 0%
5. Unimportant - 0%
Leadership

- Establish a clear vision
- Pay attention to the changes
- Model the new behaviors and actions
- Establish a structure to support the change
- Provide and participate in training
Beside the participant, who is the most important stakeholder in promoting culture change?

1. Program Administrator
2. Case Manager/ PD Counselors
3. State Program Leadership
4. Federal Program Leadership
Involvement

- Involve all stakeholders in the learning, planning, decisions, implementation, and evaluation of the change
- Spend extra time and energy working with your front line staff
- Creating a network of peer learning and champions
Learning

- Knowledge alone does not lead to change
- To create sustainable culture change, awareness and knowledge must be accompanied by the:
  - Learning of new skills
  - Opportunity to practice these skills
  - Alignment of agency policies
Learning Model

Awareness → Practice → Mastery → Organizational Norm
(Mastery) → Modeling
(Unconscious Default)
What is the most effective way to communicate information about organizational changes?

1. Orally in small groups
2. Orally in periodic organizational meetings
3. Emails
4. Newsletters
5. Depends on organization but generally all of the above
Communication

Communication is about sharing information on the change process and providing direction by:

- Articulating a clear vision of the change
- Identifying compelling reasons for change
- Create an environment of “See, Feel, Change, give Feedback on Change”

Channels

- Newsletter
- Targeted Emails
Measurement

Measurement is about defining, quantifying, and monitoring results of change. A measurement program will focus on:

- Outcomes
- Point of departure - current state
- Point of arrival - future state
- How will success be defined and measured?
- Inform the business case for future financial investment

Consumer-Directed Culture Change Dashboard

- Quantitative
- Qualitative
- “CD Program Quality Index” - AAA/SUA
- “Staff Development Quality Index”
Reinforcement

Reinforcement is about sustaining behavior change over time. This means recognizing staff and programs in the Aging Network and supporting change through:

- Linking culture appropriate recognition and rewards to change
- Clarifying expectations through goal setting and defining competencies
- Training the targeted staff to develop those skills and competencies
- Celebrating success!
Tools and Resources

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NRCPDS: Current and Future Culture Change Activities

- Training
  - Paradigm Shift and Change
  - Program Development and Implementation
  - Measurement and Information Systems
- Culture Change Project with PHI and Penn State
- Developing Core Competencies for Aging Network
- Social Enterprise Training Consortium
Training

Upcoming Webinars & TA Calls:

Please check back for updates July 2010

Training Resources

Archived Webinars & TA Calls

For questions about training, please contact:
Casey Sanders

Updated: July 1, 2010
Maintained: National Resource Center for Participant Directed Services
Training Resources

Reports:

Evaluation of the Consumer Direction Training for the ASAP Network [PDF]

The Myths and Realities of Consumer-Directed Services for Older Persons [PDF]

Trainings & Presentations:

Integrating Participant Direction in the Aging Network: Tools and Strategies for Culture Change View. A July 2010 N4A Presentation [PDF] and Resource Guide [PDF]

Shifting the Paradigm: Increasing Opportunities for Choice and Control through Participant Direction- this presentation is part of a curriculum developed for Maine. [PDF]

Principles and Practices of Person-Centered Planning- this presentation was developed for the Detroit Area Agency on Aging. [PDF]

Person Centered Planning for Consumer-Directed Care- this June 23, 2010 presentation was held at the Supporting Consumers in the 21st Century Conference

Presentation [PDF]

Resource Guide [PDF]

Webinette:

Fraud and Abuse

During this webinette we will look closely at fraud and abuse in both traditional and participant-directed programs and discuss recommended design features and strategies to prevent or reduce fraud and abuse in your program. These strategies include: 1) Clearly identify participant roles and responsibilities; 2) Provide information and training to participants, representative, and workers; 3) Ensure Effective Supports are Available; 4) Conduct Monitoring Activities; and 5) Establish Effective Communication Paths.
Resource Guide

- Articles
- Toolkits
- Videos
- PowerPoint Presentations
- Helpful Websites
Thank You

For additional questions and comments, please email us:

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