

RETREAT, LUNCHEON AND WORKSHOP SCHEDULES

**19TH NATIONAL AGING AND DISABILITY
INFORMATION AND REFERRAL SYMPOSIUM**

May 31- June 3, 2009

Reno, Nevada

NATIONAL ASSOCIATION OF STATE UNITS ON AGING
1201 15TH STREET, N.W., SUITE 350
WASHINGTON, DC 20005
202-898-2578 WWW.NASUA.ORG

STATE AND AREA AGENCY ON AGING RETREAT

SUNDAY, MAY 31, 2009

8:00 AM – 4:00 PM

Location: Silver Baron E

- 8:00 am** **Breakfast Meeting for States and Area Agencies on Aging**
- 9:00 am** **Welcome, Introductions and Agenda Review**
- 9:15 am** **NASUA and n4a Public Policy Update**
Martha Roherty, Executive Director, NASUA
Sandy Markwood, CEO, n4a
- 9:45 am** **U.S. Administration on Aging Update**
Sherri Clark, Aging Program Specialist, Office of Communications, AoA
- 10:30 am** **National I&R Support Center Update**
Bernice Hutchinson, Senior Policy Advisor, NASUA
- 11:00 am** **National Association of Area Agencies on Aging Update**
Helen Eltzeroth, Deputy Director, n4a
Theresa Lambert, Director, DTV Keeping Seniors Connected Campaign, n4a
Virginia Dize, Assistant Director, National Senior Transportation Center, n4a
- 11:30 am** **Eldercare Locator Update**
Sandra Reynolds, Manager, Eldercare Locator
- 12:00 noon** **Lunch on Your Own**
- 1:15 pm** **Hot Topics: A View from the Field**
New projects, hot topics, and future directions in aging information and referral and ADRC programs are discussed with a panel of state and area agency on aging representatives.
- 2:30 pm** **Break**
- 2:45 pm** **Elder Justice Briefing**
Robert Blancato, Matz, Blancato & Associates, Washington, DC
- 3:30 pm** **Emerging Issue Profile: Social Networking**
Facebook, Twitter and Blog: The Role of I&R and ADRC in Social Networking

AGING TRACK WORKSHOP DESCRIPTIONS

MONDAY, JUNE 1, 2009

10:00 AM – 11:30 AM

A1: National Initiatives, Trends and Resources in Aging and Disability I&R

Silver Baron E

This session will provide an overview of federal initiatives, along with national and local trends of interest to aging information and referral service delivery systems and ADRCs. Representatives from the U.S. Administration on Aging, the National Association of Area Agencies on Aging, and the National Association of State Units on Aging will discuss new directions for the Eldercare Locator, current federal projects and their implication for aging I&R/As. Participants will hear about training and technical assistance resources designed to enhance the quality of service delivery and foster professionalism of aging and disability information and referral through the National I&R Support Center.

Sherri Clark, Aging Program Specialist, Office of Communications, U. S. Administration on Aging, Washington, DC

Helen Eltzeroth, Deputy Director, Programs and Communications, National Association of Area Agencies on Aging, Washington, DC

Sandra Reynolds, Manager, Eldercare Locator, National Association of Area Agencies on Aging, Washington, DC

Bernice Hutchinson, Senior Policy Advisor, National Association of State Units on Aging, Washington, DC

A2: Digital TV: Keeping Seniors Connected: What I&R/As and ADRCs Need to Know

Silver Baron D

On June 12, 2009, television broadcasting is converting from analog to digital transmission. With funding from the National Telecommunications and Information Administration, the DTV: Keeping Seniors Connected Campaign is helping ensure that seniors are ready for the conversion. As gateways to the service delivery system, aging I&R/As & ADRCs serve in a variety of critical roles in on-the-ground implementation of the campaign. This session will provide an overview of the campaign, discuss the range of responsibilities of I&R/As & ADRCs, examine models for integrating new messages, and discuss the potential impact of the June 12 transition and strategies I&R/As & ADRCs can use to be prepared.

Theresa N. Lambert, Director, DTV Keeping Seniors Connected Campaign, n4a, Washington, DC

Peter Hebertson, Outreach Program Director, Salt Lake County Aging Services, Salt Lake City, Utah

Laura Riley, Chief, Division of Individual and Family Services, Baltimore County Department of Aging, Towson, Maryland

AGING TRACK WORKSHOP DESCRIPTIONS

MONDAY, JUNE 1, 2009

1:00 PM - 2:30 PM

A3: Leveraging I&R Resources to Improve Access to Public Benefits and Other Service Offerings

Silver Baron E

A new Administration and an ailing economy present the optimal time for profound changes in service delivery. It also creates a significant opportunity to work collaboratively towards a twenty-first century solution for streamlining benefits access and community-based services to improve peoples' lives. Learn more about the National Center for Benefits Outreach and Enrollment and join in provocative brainstorming about how policy, high-impact technology, and person-centered outreach through all information and referral sources can achieve this end.

Marlene Schneider, Vice President for Decision Support, National Center for Benefits Outreach and Enrollment, National Council on the Aging, Washington, DC

Janet Stellmon, State Information and Assistance Program Coordinator, Montana Department of Public Health and Human Services/Senior and Long Term Care Division

A4: Grandparents and Other Relatives Raising Children: What's New?

Silver Baron D

Having current and accurate information as well as federal and state legislation affecting grandfamilies can make all the difference in effective service delivery. This workshop will introduce I&R specialist and state and local aging professionals to a range of information, resources, and priority issues affecting grandparents and other relatives raising children. Participants will learn what's new in this arena, how to navigate key websites, and how to find reliable national and state data on state law and policies. Learn how to create strategic partnerships, enhance resource databases, and refine training in assessment, assistance, referrals and options counseling for grandfamilies.

Kenneth R. Bryson, Director, National Center on Grandfamilies, Generations United, Washington,DC

AGING TRACK WORKSHOP DESCRIPTIONS

MONDAY, JUNE 1, 2009

3:15 PM – 4:45 PM

A5: The Art of Options Counseling

Silver Baron E

Options Counseling (OC) is a key service of ADRCs and supports informed long-term care decision-making by assisting individuals and families by increasing understanding of their strengths, needs, preferences, and unique situations, and translating this knowledge into support strategies and plans. This session, also offered as an on-line course, is intended for staff who directly receive and respond to inquiries about long-term care options from consumers and families. Although the context is the ADRC, other programs will benefit from the curriculum. The session defines options counseling, outlines key competencies needed to offer options counseling, and describes how it operates in different organizations. It demonstrates best practice through case scenarios and presenters discuss how to address challenges encountered. Finally, presenters will also discuss how OC fits within AoA's strategic priorities.

Barbara Ettner, Senior Associate, Lewin Group, Falls Church, VA

Gilbert Thompson, Senior Associate, Lewin Group, Falls Church, VA

Sarah Lash, Research Analyst, Lewin Group, Falls Church, VA

A6: Essential Services for Nevada Elders at Risk

Silver Baron D

This session will provide background and current planning efforts for the State of Nevada to address the needs of seniors considered at risk of institutionalization given the economic hardship faced by the state. The session will describe the process initiated within Nevada's State Unit on Aging when diminishing resources threatened the availability of home and community based services historically offered through three Medicaid Waiver Programs. How Nevada's directives, service scope, priorities, revised statutes and expectations of the Older Americans Act translate into care of elders will be explored. The role of Nevada's Aging Network partners in identifying elders at imminent risk for Medicaid spend down or nursing facility placement will be reviewed. I&Rs are an essential component to recognizing and referring elders at risk of nursing home facility placement and Medicaid spend down to an ADRC for planning. Participants will learn how to begin or enhance training I&R and professional staff to recognize and report at risk elders to appropriate referrals.

Tina Gerber-Winn, Deputy Administrator – North, Nevada Division for Aging Services, Carson City, Nevada

Marilyn Wills, Deputy Administrator – South, Nevada Division for Aging Services, Las Vegas, Nevada

Teresa M. Sacks, Sanford Center for Aging, University of Nevada – Reno, Nevada

AGING TRACK WORKSHOP DESCRIPTIONS

TUESDAY, JUNE 2, 2009

8:30 AM — 10:00 AM

A7: Rides Change Lives: The Critical Role of Transportation in Supporting Elders to Live in the Community

Silver Baron E

This workshop will present information on the “family” of transportation services designed to meet the needs of older adults and the challenges involved in assuring that older people and caregivers know about the array of transportation options in the community and what makes a high quality transportation program. The workshop will explore the role of information and referral/assistance programs in assisting older people and caregivers identify and access services most suited to meeting their transportation needs. Participants will learn about a range of transportation services, understand the critical role transportation plays in assisting older people to live and thrive in their communities, and assure that I&R/As know how to connect with transportation resources in their communities.

Virginia Dize, Assistant Director, National Center on Senior Transportation, National Association of State Units on Aging, Washington, DC

Helen Eltzeroth, Deputy Director, Programs and Communications, National Association of Area Agencies on Aging, Washington, DC

A8: The Complexity of Customer Delight: Customer Satisfaction Models that Matter

Silver Baron D

Satisfying consumers with exceptional service is a complex, multi-dimensional task. It is central to strategic planning, performance measurement, and program evaluation. This workshop will present research findings from the Wisconsin Bureau of Aging and Disability Resources’ ADRC evaluation revealing five distinct domains of I&R customer satisfaction. The session will explore how to achieve the optimal balance of elements given the type of service, customer needs, area demographics, and other factors. Both I&R and ADRC professionals will delight in getting a new perspective on this dynamic concept. The session will differentiate among customer service domains and uncover strategies that provide service that appropriately balance each aspect of customer service using person centered approaches.

Amy Flowers, President, Analytic Insight, Auburn, ME

AGING TRACK WORKSHOP DESCRIPTIONS

TUESDAY, JUNE 2, 2009

10:30 AM —12:00 NOON

A9: World Class Conversations for Diverse Populations: Engaging a Cultural Competency Framework

Silver Baron E

This session will explore person-centered access to information and the need for world-class conversations to inform diverse populations seeking information about state and local services and supports. It will present and describe a cultural competency framework to engage and support aging service providers' endeavors to address the needs of a diverse aging population.

Leslie M. Swann, Aging Services Program Specialist, Center for Planning and Policy Development, U.S. Department of Health and Human Services, Administration on Aging, Washington, DC

Bernice Hutchinson, Senior Policy Advisor, National Association of State Units on Aging, Washington, DC

A10: Options Counseling Interactive Workshop for Program Planners and Managers

Silver Baron D

Program planners and managers must establish standards for how Options Counseling (OC) is provided through their organizations. This session reviews the core competencies of OC and expands learning to other managerial considerations that influence the effectiveness of how OC is delivered, for example, organizational planning and integration of services, staff training, development and supervision, and program evaluation. Program planners and managers will benefit from exploring how to plan and implement OC within the context of their unique organizations and community settings. They will have the opportunity to share questions with each other, and learn what's working from their peers. The group will also discuss how OC fits within the Administration on Aging's strategic priorities.

Gilbert Thompson, Senior Associate, The Lewin Group, Falls Church, VA

Barbara Ettner, Senior Associate, The Lewin Group, Falls Church, VA

Sarah Lash, Research Analyst, The Lewin Group, Falls Church, VA

ANNUAL AGING LUNCHEON

TUESDAY, JUNE 2, 2009

12:15 PM—2:00 PM

Keeping a Promise: Serving Nevada's Elders in Tough Times

The Division for Aging Services develops, coordinates, and delivers a comprehensive support service system for older Nevadans. Learn about the challenges shaping it current priorities and how this dynamic division maintains its commitment to promoting the independence and dignity of its most vulnerable elders by protecting their rights, fostering their independence, and advocating for their self-sufficiency.

Carol Sala, Administrator, Nevada Division for Aging, Department of Health and Human Services, Carson City, Nevada

Project 2020: Building on the Promise of Home and Community Based Services

The National Association of State Units on Aging (NASUA) and the National Association of Area Agencies on Aging (n4a) – conscious of the financial pressures facing states and the federal government – have developed a coordinated national long term care strategy that will generate savings in Medicaid and Medicare at the federal and state levels while enabling older adults to get the support they need to age where they choose.

Project 2020 is a comprehensive and integrated approach to enabling older adults and persons with disabilities to make their own decisions, take steps to manage their own health, and receive the care they choose in order to remain in their own homes and communities for as long as possible, avoiding unnecessary and unwanted institutionalization. Medicaid trend data will be shared that suggests that states **that** have made **the most** progress in shifting the balance from institutional care to home and community based care also experienced lower rates of increase in long term care spending for older adults and younger individuals with physical disabilities. Learn how this dynamic strategy can enhance the delivery of information and referral/assistance and options counseling throughout the nation.

Martha A. Roherty, Executive Director, National Association of State Units on Aging, Washington, DC

AGING TRACK WORKSHOP DESCRIPTIONS

TUESDAY, JUNE 2, 2009

2:15 PM — 3:45 PM

A11: Fostering Excellence in Serving Persons with Disabilities – I & R/A Skills and Resources

Silver Baron E

This workshop will provide individuals in the field of I&R with the basics of providing I&R services to individuals in special populations, specifically increasing awareness of how to assist seniors and individuals with disabilities. Participants will be provided with tools regarding person-first language and how to communicate effectively with individuals with disabilities. Content will include disability etiquette, assistive technology and alternative formats of information. The presentation will consist of lecture, discussion, case studies, and more.

Jamie Hayhurst Marshall, Assistant Program Manager, Assistive Technology System, Center for Excellence in Disabilities, West Virginia University, Morgantown, West Virginia

Melina Danko, Public Relations/Dissemination Manager, Center for Excellence in Disabilities, West Virginia University, Morgantown, West Virginia

A12: Can You Say Private Pay?

Silver Baron D

To survive and thrive, many aging I&R/A and ADRC programs are examining their capacity to serve private paying consumers. This session will unveil a new issue brief and survey results from the aging network that reveal challenges, opportunities, and promising practices for improving the I&R and ADRC experience for private paying consumers. The session will address how serving private paying populations fits within the U.S. Administration on Aging's strategic priorities.

Bernice Hutchinson, Senior Policy Advisor, National Association of State Units on Aging, Washington, DC

Sarah Lash, Research Analyst, The Lewin Group, Falls Church, VA

AGING TRACK WORKSHOP DESCRIPTIONS

WEDNESDAY, JUNE 3, 2009

10:45 AM — 12:15 PM

A-13 Rising Incidence of Provider Fraud and Abuse within Aging and Other Vulnerable Communities: What You Should Know and What You Can Do About Protecting Your Agency

Exposition Hall A

It happens in every community in America. Contractors, personal care workers, sales agents and others are welcomed into homes, only to find out later the door was opened to someone who takes ones money, dignity and even in a few, horrific cases their life. Older adults are particularly vulnerable because of their assets and/or declining mental or physical capacities. I&R/A specialists can learn about the rising incidence of fraud and abuse; the value of expanding inclusion policies to ensure safety of clients; and case study on new strategies to strengthen resource directories while protecting your clients and agency.

Bob Blancato, Matz Blancato, Washington DC

Tony Kester, Director, SC Lieutenant Governor's Office on Aging, Columbia, SC

Doug Zimmerman, VisionLink, Colorado Springs, CO

Mark Hansan, CertiClear, LLC, Bethesda, MD