

Linking Housing and Long-Term Care Services for Older Adults

Information Brokering for Long-Term Care

A Project of the Center for Home Care Policy & Research
Visiting Nurse Service of New York

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Conference Dates: February 12-13, 2004

Center for Home Care Policy & Research

Project Purpose: DATA TO INFORMATION TO ACTION

- Improve dialogue and strengthen links between long-term care researchers and policymakers
- Bring latest research findings to policymakers
- Make research more policy-relevant

Meeting Participants (38)

- State and local policymakers (11)
- Federal level policymakers/
representatives from associations (13)
- Researchers (10)
- Representatives from foundations/other (4)

Meeting Objectives

- Examine issues related to linkages between housing and supportive services
- Review state experiences
- Identify “high leverage” strategies and mechanisms
- Identify policy-related research and demonstration needs/opportunities

Clarifying the Issues

- Current housing/service terms mean different things to different people
 - » This is a significant problem for policy, regulation, evaluation, and marketing
- How “assisted living” differs from “residential care” (and how both differ from “institutional care”) remains unclear and raises difficult philosophical and practical issues

Clarifying the Issues

- Advances in policy and research require clearer definitions and classifications
- Type of housing should be distinguished from—and not tied to—the type and content of supportive services

The Need for Classification

- Who is being served?
 - » Level of frailty
 - » Services needed
 - » Source of payment (e.g., out-of-pocket, Medicaid, other insurance)

The Need for Classification

- Where is that person being served?
 - » Individual vs. group setting
 - » Building ownership
 - » Purpose-built vs. retrofit
 - » Physical characteristics (e.g., type of structure, size, private rooms/bathrooms, amenities, etc.)
 - » Entry/exit requirements (the ability to “age in place”)

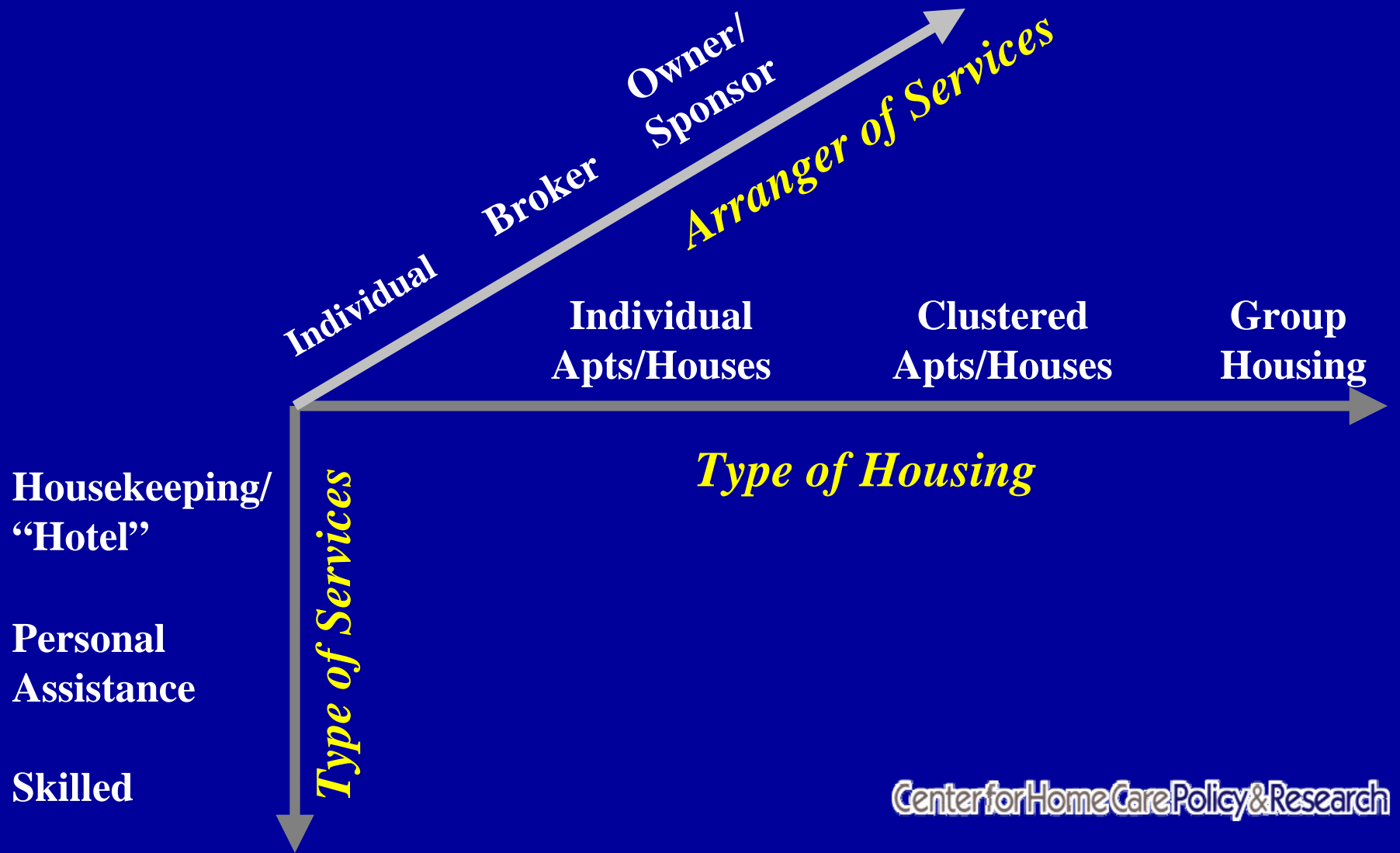
The Need for Classification

- What services are being provided, by whom, and how are they packaged?
 - » Housekeeping/“Hotel” services (e.g., meals, laundry, recreation)
 - » Personal assistance services (e.g., bathing, dressing)
 - » Skilled services (e.g., service coordination, medication management, 24-hour nurse oversight)

The Need for Classification

- Develop a common terminology
- Consider housing and services as a “portfolio”—portfolios vary along several dimensions
- Start with three dimensions:
 - » Type of housing
 - » Type of services
 - » Arranger of services

Housing and Supportive Services Portfolio



Conference Papers

- “Homes of Choice: Towards More Effective Linkages Between Housing and Services” - Jon Pynoos, Phoebe Liebig, Dawn Alley, and Christy M. Nishita
- “Public Funding for Long-Term Care Services for Older People in Residential Care Settings” - Janet O'Keeffe and Joshua Wiener

Conference Papers: Case Studies

- “Public Policy Initiatives Addressing Supportive Housing: The Experience of Connecticut” - Nancy W. Sheehan and Claudia E. Oakes
- “Supportive Housing Initiatives in Arkansas” - Debra Tillery

Rationale: Why States Should Invest in Service-Enriched Housing

- Provide alternatives to institutionalization
- Allow older persons to retain independence in settings of their choice
- Increase service delivery efficiency
- Increase resident satisfaction
- Decrease resident turnover

Critical Policy Issues for Service-Enriched Housing

- Mobilizing necessary financial resources
- Developing physical infrastructure
- Rationalizing regulatory concerns and philosophical issues (e.g., entrance criteria)
- Creating and packaging the housing and service components

Medicaid-Specific Issues

How Can Medicaid...

- Provide coverage in residential care settings when it is not allowed to pay for room and board?
- Meet private pay expectations for privacy, amenities, and quality when it cannot afford the rates?
- Offer consumers a sense of what to expect given variable definitions of assisted living?

Medicaid-Specific Issues

How Can Medicaid...

- Assure a minimal level of quality of care without imposing so many rules that make the regulated *floor* become the *ceiling*?
- Allow individuals to age in place without turning residential facilities into *de facto* nursing homes?

Key Points

Strategic Planning & Partnerships

- Strong, effective leadership at a high level in the executive branch is essential
- Public awareness is essential
- Comprehensive planning enables the development of a vision for all persons

Key Points

- Partnerships among different agencies, service providers, and private organizations are vital
- Program evaluation is necessary to assess outcomes and to address unanswered questions

Key Points

Resource Allocation

- Resources should be mobilized to:
 - » Prevent affordable housing for older adults from converting to market prices
 - » Develop new housing stock and establish purpose-built assisted living
- Combining traditional resources with tax credits expands funding options

Key Points

Operations

- Housing sponsors need to be encouraged to incorporate services into existing housing
 - » Promote the advantages of onsite service coordinators and linkages to local service providers
- Service providers need incentives to incorporate housing into service programs

Deliberations and Recommendations from Conference Participants

Breakout Sessions

- Focus areas for the three groups:
 - 1) Strategies for integrating housing and supportive services at the policy level
 - 2) Strategies for integrating housing and supportive services at the operational level
 - 3) Strategies for ensuring consumer choice and autonomy

Breakout Sessions

- Discussion questions:
 - 1) What are the main goals to be achieved?
 - 2) What are the high-level mechanisms that will achieve these goals? (Are current models available to emulate?)
 - 3) What are the major barriers?
 - 4) What are the research/demonstration needs?



Goals: Policy Level

- Recognize the differences between housing and service agencies
- Identify and implement mechanisms and models to bridge organizational and programmatic differences
- Align agency missions over the long run

Mechanisms: Policy Level

- Coordinate a planning process between housing and service agencies
- Develop a manual for coordination
 - » Create at federal level, then road show to states
- Find a champion to lead the effort



Mechanisms: Policy Level

- Identify small steps that can be taken (e.g., increase the value of HUD vouchers to cover assisted living)
- At the same time, identify processes in need of fundamental changes (e.g., Medicaid financial eligibility)

Mechanisms: Policy Level

- Disseminate information on successful models (e.g., Interagency Council on Homelessness, National Governor's Conference on Aging)
 - » Rotate chairs
- Bring these models to scale

Goals:

The Operational Level

- Create a system that responds to consumer needs
- Bring state/local housing and service providers together
- Help public housing evolve by promoting co-location of housing and services AND by building new capacity

Mechanisms: The Operational Level

- Develop strong leadership “to ignite fires” at all levels
 - » Accountability/ownership is essential
- Create political buy-in (including consumers)
- Promote extensive training (from direct care to system development)
- Find ways to move money around to create demonstrations

Mechanisms: The Operational Level

- Rely on creative uses of assets (not just income) for all income levels
- Leverage public-private partnerships
- Integrate resources to find the right balance

Goals:

Consumer Choice and Autonomy

- Include consumers in decision-making/planning process
- Promote informed decision-making
- Allow entitlements to follow the person (irrespective of settings)
- Provide home-like settings (including privacy, control, a voice)
- Let consumers make their own entry/exit decisions

Mechanisms:

Consumer Choice and Autonomy

- Make the locus of control the consumer, where possible—empower consumers with cash/service budgets
- Provide consumers with information and a network of advocates
- Create incentives for state/local change
 - » Put more resources at the state level where decisions are being made

Mechanisms:

Consumer Choice and Autonomy

- Build capacity for an array of services
 - » Provide technical assistance to providers
 - » Create innovative service packages that can apply to existing housing projects
- Build new systems of quality assurance that provide a level of safety while maintaining consumer preference

Common Barriers

Structural

- Inertia (difficulty budging from the status quo)
- The need for systemic change in structure and culture
 - » Piecemeal reform is slow, difficult, and expensive
- The lack of leadership/champions



Common Barriers

Structural (continued)

- “Turf problems” are an issue at all levels
 - » Lack of cooperation and incentives to collaborate
- Federal and state committees/agencies each have different:
 - » Areas of responsibility (and concerns re: control of funds)
 - » Legislative mandates
 - » Time horizons

Common Barriers

Consumer-Related

- Identifying the appropriate limits of consumer choice (e.g., What level of risk should be allowed? What is the level of public accountability?)
- The ability to balance individual choice vs. provider capacity and packaging of services
- Difficulties addressing the idea of “entitlement”

Common Barriers

Regulatory

- Regulatory incompatibility between housing and service agencies
- Discrepancies between nursing/practice requirements and people's needs/wants
- Liability concerns—esp. on housing side

Common Barriers

Financial

- Affordability of room and board
- Inflexibility of funding sources
- Intergenerational tension (esp. for housing)

Common Barriers

Service-Related

- Special issues around serving complex populations (e.g., mentally ill)
- Some services and items people want most are not funded
- Tension—more choices, harder to integrate

Research Needs

- Assess range of housing and service arrangements to identify innovative models and natural experiments
- Determine what outcome measures should be used and how to use them
- Document cost and quality of life outcomes

Research Needs

- Learn about consumer needs/choice from how people with higher incomes purchase services
- Analyze consumers' income and asset structure by age group (e.g., 65+, 85+)
- Identify/create additional models of consumer-directed programs as examples for states (including usable tools)

Research Needs

- Pursue research on consumer issues, including:
 - » Cost implications (e.g., setting individual budgets)
 - » Effective ways to educate consumers
 - » Balance between quality assurance and regulations