

# GRANT HIGHLIGHTS

APRIL, 2009

*This information comes from GrantBriefs, RRF's bi-monthly internal newsletter. Much of the information is taken directly from grantees' reports and is presented in their own words. We thank grantees and others for their contribution to Grant Briefs.*

## **U. Minn. Develops Decision Tool for Long-Term Care Support**

In 2007, RRF made an \$80,000 grant to the University of Minnesota's School of Public Health to develop and pilot test a web-based educational decision tool for older adults and family caregivers. The purpose of the tool is to provide information about the range of long-term support services that exist and to help older adults and family caregivers determine the best options for their situation. The project built upon a shared decision-making tool that was first developed by oncologists at Dartmouth to help patients facing difficult medical choices learn about and compare treatment alternatives. Research documented the value of this approach in the acute care setting. Dr. Robert Kane, the PI on the RRF grant, sought to adapt and test the usefulness of the tool with individuals facing equally challenging decisions around long-term care.

With earlier funding from the Aging and Disability Resource Centers, Dr. Kane created a template that included an assessment of long-term care needs. With RRF funding, Dr. Kane was able to develop a much more comprehensive tool, test it with focus groups of elders and caregivers, get input from experts in the field, and refine and retest it several more times. The result is an excellent web-based tool entitled "LTC DECIDE." Please check the tool out on the website at <http://ltc.hsr.umn.edu/index.html>.

LTC DECIDE includes a lay description of a full array of informal and formal long-term care supports, including home health care, adult day services, assisted living, and skilled nursing care. There are two assessment tools. The first takes users through a quiz about the older adult's functional capacity in both basic and instrumental activities of daily living. The second takes caregivers through an assessment of their own physical, emotional, and financial capacity to serve as a long-term support source for their loved one.

This project was successfully completed and resulted in the creation of an accessible and easy-to-use website. While the tool is useful to consumers on their own, it would be even more effective if it were incorporated into a case management system. Dr. Kane is exploring its use with the Aging and Disability Resource Centers across the country. These centers are basically one-stop shops for information and assistance for older adults. Dr. Kane has presented the tool to the Centers for Medicare and Medicaid Services as the first step in encouraging its broader use.

## **Generations Project Mobilizes Indiana Advocates Around Long-Term Care for Elderly and Persons with Disabilities**

In 2007, RRF provided a second-year grant of \$75,000 to The Generations Project, a collaborative effort of consumer advocates committed to educating citizens, policymakers, and other advocates about the opportunity to rebalance the long-term care system in Indiana. Rebalancing the long-term care system means moving away from an emphasis on nursing homes and toward more home- and community-based services. In 2002, The Generations Project researched, wrote, and published a systems change model for comprehensive home- and community-based services, driven by consumer choice and independence. The model became the catalyst for change in Indiana. The State adopted the model in 2003, known as CHOICE, and committed to its initial implementation. In 2006, RRF made its first grant (\$71,000) to The Generations Project to monitor progress of the implementation of CHOICE. This second grant followed a year later.

The Generations Project has been highly successful at reaching out, educating, and engaging Hoosiers, Medicaid recipients, advocates, legislators, and legal service providers. It reached 4.7 million viewers and readers through television, newspaper, and Internet media coverage of its press conferences and advocacy rallies. It continues to do an excellent job of building a coalition and engaging seniors as advocates for individuals and system change.

The ability to build a strong coalition and gain media coverage had significant pay-off when, unexpectedly, Indiana privatized the Medicaid program. As a result, seniors and persons with disabilities faced burdensome requirements for recertification, endured limited access to processing sites, and had to contend with forms that were difficult to read and understand. Approximately 1,500 case managers who had previously assisted seniors and persons with disabilities in applying for benefits were eliminated.

The Generations Project was flexible enough to mobilize hundreds of seniors as volunteers to help individual Medicaid beneficiaries get recertified and share with the media compelling stories of individuals who were endangered by the new system. As a result, some progress was made in reducing the effects of privatization. About 35 percent of Indiana counties were not affected, including two large population centers. During this advocacy effort, however, the focus on rebalancing the long-term care system had to be delayed.

The most significant achievement of this grant has been The Generations Project's ability to build a coalition of consumers and key organizations who are now more knowledgeable about the Indiana Medicaid system and more appreciative of the value of advocacy. Strong relations have been built with AARP Indiana and the Indiana Legal Services, unions, and other stakeholders. The capacity of the coalition will be put to test as budget constraints tempt Indiana officials to reduce Medicaid spending to the detriment of low-income seniors and persons with disabilities. In late 2008, RRF made

a third year grant of \$85,000 to The Generations Project to continue its advocacy efforts to protect Medicaid beneficiaries and rebalance the long-term care system.

## **Four Organizational Capacity Building Projects Completed**

Over the past two months, the Guild for the Blind, Japanese American Service Committee, Illinois Adult Day Services Association, and LaSalle Senior Center completed their organizational capacity building (OCB) projects. The first, Guild for the Blind, provides vision rehabilitation, counseling, job and computer training, and information and referral to 3,500 persons annually. Almost 80 percent of its clients is age 55 or over. In 2005, the Guild received a \$54,405 grant to improve its resource development capacity, and the board governance work related to it, and to establish a better program evaluation process.

The Guild made considerable progress in both areas. The grant enabled the Guild to improve its resource development and communications infrastructure. The Guild began by conducting a resource development assessment, which then guided the organization through several changes. Improvements included: revising the schedule and personalization of annual appeals; redesigning the website with the addition of online giving capability; creating a new marketing brochure; and revising the format for reporting financials publicly. A consultant developed major giving approaches and systems for the Guild and trained its staff in these areas. With the consultant's guidance, the Guild made five requests for major gifts and received two.

The Guild also diversified its funding sources. It raised a greater percentage of its \$900,000 budget from public funding. At the start of the grant period, it was receiving no public funding. At the conclusion, 46 percent of its budget was coming from public sources. The Guild now receives funds from the Veterans Administration and the Illinois Departments of Public Health, Aging and Human Services. The Guild also increased the percentage of its budget from fees for service. It now receives 18 percent, exceeding the goal of 10 percent. Overall, the Guild's systems and approaches seem to be working well, and the organization appears to be much more stable.

The Guild was successful at meeting its second objective, i.e., developing logic models for each program area, specifying outcomes, and selecting and using appropriate measurement tools. The evaluation process is now in full force, and the information is being entered into the new database.

The Guild is still working on improvements in board governance. The Guild has a third-year OCB grant to continue its work in this area and to complete some of the technical work on the website and database.

The second OCB grantee, Japanese American Service Committee (JASC), provides adult day services, home support, counseling, nutrition, and social and cultural programs. The elderly account for 94 percent of JASC's clients. RRF made a \$59,566 OCB grant to enable JASC to improve its capacity in the areas of financial management and resource development.

JASC made considerable improvements in its financial systems that have resulted in greater efficiency and accountability. JASC hired the Nonprofit Financial Center (now part of Lumity) to perform a financial check-up and an in-depth review of accounting functions. The Center assisted JASC with the search and selection of a new auditor who has much more knowledge and experience in nonprofit accounting. The Center prepared a report with recommendations to JASC's Board. The Center then redesigned JASC's financial reports to provide better information for management and to improve budgeting process. The Center also reviewed JASC's technology needs related to financial management. It was able to enhance JASC's existing software, thus saving JASC the cost of replacement. The Center also assisted JASC in searching for, selecting, and transitioning to a new controller. Through the process, JASC's board gained an appreciation of the need to provide professional resources for the organization.

JASC retained a development consultant to assist in creating a fundraising plan for the organization. Presentations were made to the board to clarify staff and board responsibilities in this area. The board came to realize that it needed to support a full-time development associate to implement the fundraising plan. Additional funding was secured for the position.

The third OCB grantee, Illinois Adult Day Services Association (IADSA), is a membership organization of 74 adult day sites across the state. RRF made a third-year, \$27,500 OCB grant to enable IADSA to continue addressing a number of organizational and leadership development issues. Objectives included: 1) formalize and document the association's operational systems; 2) design and implement a leadership development plan for its governing council; 3) develop a plan to hire a permanent part-time executive director; and 4) pursue strategies to support the paid staff position.

IADSA made considerable progress in meeting the organizational and leadership development objectives although it has not yet completed all of the proposed tasks. IADSA has committed to using its reserves to retain the paid staff position for another six months while it seeks additional ways to sustain it.

At the close of the grant, IADSA had completed about 60 percent of its operations procedural manual. It expects to complete it over the next six months. The manual includes all record keeping, report submissions, training events and materials, membership data base, and financial procedures. An administrative volunteer assisted IADSA with updating the membership database, editing and maintaining the member listing on the Association's website, consolidating training class lists, and other administrative tasks. The website has become a much stronger communications vehicle. The Illinois Department on Aging now directs potential adult day service providers to the website, and members use it routinely to communicate with each other. Families also use the website to locate nearby adult day services.

IADSA has begun restructuring its governing council. Its new infrastructure has representation from each region. IADSA reported that the process has begun to enhance relations between members and with service providers such as senior centers,

Area Agencies on Aging, and non-member adult day service providers. Several new members are assuming leadership roles on committees, a nominating process has been put into place, and newly formed committees are recruiting new blood.

IADSA is working on securing funding to support the part-time executive director position. This position is essential if IADSA is to continue to be effective in representing an important service industry that needs a strong voice.

The fourth OCB grantee, LaSalle Senior Center, serves 250 seniors on Chicago's near north side. Most reside in Chicago Housing Authority and Housing and Urban Development apartment buildings near the LaSalle Street Church. RRF made a three-year, \$34,132 OCB grant to enable LaSalle Senior Center to hire a half-time coordinator to manage volunteers. The Center depends heavily on its volunteer corps to deliver services such as information and assistance, meals, transportation, socialization, and exercise classes.

Prior to the grant, the Center had only one full-time paid staff. He was juggling the volunteer program and case management, while also building the Center's resource and governance capacity. Under the direction of the new volunteer coordinator, the Center identified needed volunteer skills; implemented a volunteer recruitment, application and screening process; instituted a yearly volunteer evaluation and recognition program; and encouraged financial support from volunteers. Over the course of the grant, the volunteer corps more than doubled in size--from 40 to 91. Two of the new volunteers joined the Center's board. Volunteers contributed \$5,600 in 2008. While this appears to be a relatively small sum, the Center's volunteers are of fairly modest means. The Center has committed to sustaining the part-time volunteer coordinator. Hopefully, the larger corps of volunteers will be able to reach out to other potential donors, and build a larger financial base for the Center.

## **Two Accessible Faith Grantees Complete Renovations**

Recently, two RRF grantees improved the accessibility of their houses of worship. The first, St. Mark United Church of Christ, is located in Chicago Heights. It is a small congregation of only 65 members. However, almost 60 percent of the congregation is elderly. Prior to receiving the grant, the church had no accessible restrooms. It also had a walkway from the parking lot that was dangerous due to pitting. It posed a hazard for people using walkers and wheelchairs.

With a \$25,033 Accessible Faith grant, the church successfully renovated two restrooms. It also improved the walkway and made the sidewalk twice the original width. It created a new space by the front entrance for resting benches and informal gatherings.

A Hispanic Seventh Day Adventist congregation shares St. Mark's space. The church was so pleased with St. Mark's improvements that it decided to begin contributing on a regular basis to the maintenance of the building.

The second Accessible Faith grantee, Saint John Berchmans Parish, is a Roman Catholic Church located in Logan Square. A much larger congregation, St. John Berchmans has 1,500-members, primarily of Hispanic background. About 25 percent of the congregation is composed of older adults.

Prior to the grant, Saint John Berchmans had no accessible entry or route between the lower and main levels of its building and there were no accessible restrooms. A \$30,000 Accessible Faith grant partially supported the installation of a full-sized elevator to provide an accessible entrance and route between levels and the renovation of two restrooms on the lower level.

The project was successfully completed, but it ran into several problems in the process. Modifications had to be made which affected the time line and cost of the project.

Despite these problems, the pastor provided an eloquent description of unanticipated outcomes in his final report. He wrote, "One positive aspect that was not anticipated is a greater sense of community ownership of and community pride in our church. The accessibility project focuses on respect for diversity and sensitivity to others. This creates a different attitude in the congregation...The enhanced beauty and accessibility of the church have stimulated unexpected feelings of joy and hope."

## **Spoon River College Expands "Retirees Leading" Program**

Spoon River College, a community college serving rural west-central Illinois, received a three-year, \$61,655 RRF grant to develop and launch the "Retirees Leading Program." The purpose of the program is to train older adults as leaders and assist them in finding appropriate volunteer roles with community agencies. The program began in Canton County. By the end of the third year, it had also expanded to the counties of McDonough and Mason.

The program began by forming an advisory group of representatives from key community organizations and business groups, including the Chamber of Commerce, YWCA and YMCA, the Park District, United Way, and the Canton School District. The advisory panel helped the program establish credibility and provided many outreach opportunities.

Retirees Leading created and conducted leadership academies involving 10 to 12 seniors at a time. The academies continue to be offered twice a year. The participants go through a series of trainings (six 3-hour sessions) and goal setting activities to find or create an appropriate volunteer or paid opportunity. Over 65 seniors have graduated from the Academies. The graduates are now serving in agencies such as S.C.O.R.E., Habitat for Humanity, Illinois River Correctional Center, Partnership for Economic Development/ Chamber of Commerce, and University of Illinois Extension.

Graduates of the Leadership Academies have organized and hosted annual Retirement Learning Institutes. The Institutes are day-long educational sessions on

issues of interest to seniors. By the end of the grant period, over 600 seniors had attended these Institutes.

Retirees Leading Academy graduates established a lending library of leadership development materials. They also launched two special programs: 1) Generations Connect, in which seniors work with at-risk students, and 2) the BIG READ, a National Endowment for the Arts-funded program, in which seniors work on a variety of literacy projects. Both of these programs have received ongoing financial support.

In the third year of the grant, Retirees Leading expanded its outreach to two additional counties. In McDonough County, Retirees Leading has been collaborating with 20 community organizations to create and link volunteer opportunities to seniors. It held a Retirement Learning Institute on the Spoon River College Macomb campus, which was attended by 80 retirees. In Mason County, the first ten participants graduated from a local Leadership Academy. The graduates are working on creating a Fire Department Auxiliary for the county.

Retirees Leading has gained state and national attention. It won the Illinois Governor's Home Town Award. Its staff has been tapped to serve on the Illinois Community College Board Lifelong Learning and Service Coalition and the Illinois Policy Academy. Retirees Leading received a \$1,000 grant from the National Governors' Association to develop a guide for use by other community colleges. Operating on a modest budget with part-time staff, Retirees Leading is sustaining itself with local support from banks, Dynegy, Inc., and state funding from the Department of Commerce and Economic Opportunity.

## **Center of Concern Faces Increased Demands for Service**

In 2007, RRF made a one-year, \$35,000 discretionary grant from Trustee McParland to the Center of Concern to continue providing supportive services to frail elderly and persons with disabilities. The Center of Concern has been serving Park Ridge and the northwest suburbs for 30 years. Its Senior Support and Geriatric Counseling Program provides case management, personal counseling, ongoing companionship, daily telephone contact, assistance with shopping and chores, transportation and escort services, and in-home caregiving and housekeeping. It also offers legal, financial, and Medicare/insurance counseling. Almost half of the Center's clients live alone and do not have close relatives or friends for support.

During the grant period, the Center experienced a considerable increase in demand for service, especially for case management. The number of short-term clients increased by 80 percent. The number of new clients age 80 or over increased as well. Fifty-seven percent of new clients were age 80 or over. These elders had particularly complex needs.

The Center met all of its service objectives and exceeded its projected volunteer growth. The Center provided case management services to 191 senior clients. Fifteen percent were new clients, and the rest were ongoing cases. Office volunteers augmented services by providing 7,300 telephone reassurance calls. Field volunteers

made nearly 2,100 friendly visits. The Center's licensed social workers provided 92 seniors with 414 individual therapy sessions. Social workers advised 174 seniors and 180 family members on resources and caregiving decisions. The Center's in-home health care referral program responded to 620 inquiries and placed 136 caregivers with frail elderly for personal care and companion services. The Center's 15 chore workers provided 5,300 hours of service to 106 seniors.

The Center depends on its large corps of 293 service volunteers. Twenty-seven percent of the volunteers were new during the grant year. The Center's fundraising auxiliary also welcomed 38 new volunteers who helped make the 30<sup>th</sup> anniversary events even more successful than expected.

### **Medicare Rights Center Plans to Help States Optimize Medicare**

Last summer, RRF made a \$15,000 Presidential grant to the Medicare Rights Center (MRC) to explore the feasibility of working with states to optimize payments by the Medicare Prescription Drug Program for cases that go to appeal. This would conceivably reduce state health care costs. MRC planned to assess states' handling of the appeals and counseling process and to select six or seven states with which to partner to improve their capacity in this area.

Over a three-month period, MRC met with 20 representatives from seven states, including advocacy organizations, State Departments of Aging and Area Agencies on Aging, to design and determine the feasibility of the project. MRC created a chart to describe and compare each state's ability to pay for drugs not covered by Part D either through a State Pharmaceutical Assistance Program or through its Medicaid Program.

MRC learned that most states did not cover drugs denied by Part D plans, either from general revenues or Medicaid. Thus, it determined that an approach that used the Part D appeals process would be too limited a strategy for reducing state health expenditures. MRC decided to broaden its plan to help states optimize Medicare payments beyond the Part D appeals process. It developed two additional strategies, including eliminating bureaucratic hurdles to enroll in Medicare low-income assistance programs and improving outreach and education on benefits to consumers and providers.

MRC successfully secured funding from three foundations (the Baisley Powell Elebash Fund, Samuels Foundation, and Public Welfare Foundation) to roll out its broader plan. Funding has enabled MRC to begin working with the states of New York, Kansas, Florida, and Maine on optimizing Medicare payments.

### **AFAR Offers Online Forum for Emerging Issues in Aging**

In 2006, RRF made a \$101,750 grant to the Alliance for Aging Research (AFAR) to develop the "Sage Crossroads" website. This interactive website is the premiere

online forum for emerging issues of human aging. The website translates and disseminates research results on aging for easy access by consumers, policymakers, and the media. Featuring news, online discussions, and debates, the website provides an opportunity to explore the impact of science and technology on aging. Visitors to the site can watch, listen, and interact with prominent experts in the field of aging. Online users and forum leaders engage in critical discussions covering the ethical, political, economic, and societal implications of medical discoveries.

RRF's grant enabled AFAR to produce webcasts on a quarterly basis and add new articles on a monthly basis. AFAR added a new popular feature--"expert trading cards." These cards feature scientists from around the world and summarize interesting facts related to their work. The cards can be viewed or traded with others through email. Try out this educational and engaging website at [www.sagecrossroads.net](http://www.sagecrossroads.net).

The website audience continues to grow as does the amount of information added to the site. In the month of the final report, 30,000 podcasts were downloaded. AFAR conducts an annual survey of site and non-site users, including policymakers, reporters, and researchers. It determines their preferences, current use of SAGE Crossroads, features and functions that should be added or changed, and usefulness of the site to their work. The results of the survey guide AFAR's decisions about content, features, and tools that will strengthen the website.

## **Iroquois Mental Health Center Trains Providers on Substance Abuse and Aging**

An \$8,000 RRF discretionary grant from the late Trustee Hurley was awarded to the Iroquois Mental Health Center (IMHC) to provide training on substance abuse among older adults to county mental health and social service professionals. IMHC planned to train 50 professionals from the Iroquois Mental Health Center and other agencies in the county.

IMHC retained the services of Dr. Gerald Shulman, an expert who had developed the American Psychological Association's Treatment Improvement Protocol on substance abuse and aging for the U.S. Substance Abuse and Mental Health Services Administration. Dr. Gerald developed a very comprehensive training program. The content included: scope and nature of substance abuse among seniors; changing physiology of older bodies; polypharmacy challenges in older drinkers; impact of drinking and use of over the counter drugs; and link between drinking and pain. The content also covered diagnostic problems related to older adults (anxiety, stigma, comorbidity masking problem behaviors, cognitive loss); depression as both a cause and consequence of substance abuse; characteristics of early vs. late-onset alcoholism; appropriate screening instruments; motivating factors for behavior changes; and implementing an older adult treatment protocol.

IMHC held three days of workshops: a one-day workshop for non-IMHC professionals and a two-day workshop for IMHC staff. Unfortunately, only 20 non-IMHC professionals attended the first day of training. In part, this could have been due to

weather conditions. In the week leading up to the workshop, the town of Watseka, where most of the agencies are located, experienced massive flooding. This qualified the area for federal disaster assistance, and many agencies were preoccupied with emergency needs. Then, on the first day of training, a huge snow storm occurred.

In contrast, IMHC saw very good attendance at its two-day, in-house training. Fifteen IHMC staff attended. This represented 75 percent of the total staff and all of the professional staff. Every IMHC counselor is now better equipped to identify, screen, and treat older persons with problems of substance abuse and depression.

IMHC also improved the tracking of its older clients. Data show that the number of elders served is increasing. In 2007, 74 clients age 55 and over were served. The number increased to 86 in 2008. In the most recent six-month period, 89 older clients were served--an unprecedented number for the agency.

Overall, this project was successful. A modest grant enabled IMHC staff and several professionals from other agencies to become more aware of the issues of substance abuse and the elderly and to be better equipped to identify and assist this population.