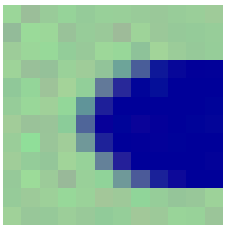
Designing the Aging Information Resource System of Tomorrow

THE VISION 2010 SELF-ASSESSMENT GUIDE

A Strategic Planning Tool



National Aging Information and Referral Support Center
National Association of State Units on Aging
Washington, DC

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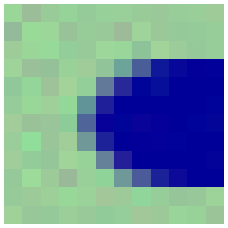

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Introduction

Changing times are rapidly expanding older Americans' choices and increasing information needs, and state aging service systems are responding. Over the past 35+ years, the state aging systems have worked hard to become recognized among older adults as the *pre-eminent* provider of accurate and unbiased information and assistance within the larger universe of aging information sources.

Since 1965, state aging networks have developed a wide range of information, counseling, education, and advocacy programs. Among these are: Information and Referral/Assistance; Eldercare Locator; National Family Caregiver Support Services; State Health Insurance Information, Counseling and Assistance Program; Case Management; Long Term Care Ombudsman; Legal Services; Elder Abuse Prevention and Adult Protective Services; Nutrition Services; Senior Centers; and Pension Counseling Projects.

While responding to millions of older consumers and their family members each year on a full range of issues, aging information services are not, as many assume, a single coordinated entity. The various aging service programs were initiated at different points in time in response to specialized needs of older persons and/or their families, frequently with discrete funding streams—resulting too often in fragmentation, duplication of effort, inefficiency, and consumer frustration.

Because consumers of all ages depend on information and because information is expanding at exponential rates, a concept has emerged for creating a unified system that makes it much easier for consumers to navigate. By re-conceptualizing and re-designing current programs to function as part of a comprehensive ***aging information resource system***, the state aging network will be positioned to better inform, provide decision support, and empower older consumers and their families. Further, with the development of the 2-1-1 abbreviated dialing codes for access to health and human services information resources, state aging systems can more effectively link consumers with the entire range of supports available both through the aging network and the larger universe of information sources.

Vision 2010: Towards a Comprehensive Aging Information Resource System for the 21st Century lays out a number of policy and program challenges which must be addressed in order to transform the current system into a *consumer-centered*, "one-stop" aging information resource system. With the aging of the "baby boomers" the need and demand for accurate information on the full range of issues will dramatically increase. The population of elders, particularly those 85 years and older, continues to grow, increasing the volume of consumers dependent on the aging information resource system. The cultural and ethnic diversity of the older population is growing more rapidly than ever before. While a rise in overall education means many are more informed, there will continue to be many under-schooled elders – requiring a modernized system to accommodate a wide range of abilities to access information. Continued stagnant resources require creative new approaches to financing a modernized system. Despite limited resources, the ability to transform the increasing body of available information into knowledge demands well-trained, skilled personnel.

In June 1999 the Membership of the National Association of State Units on Aging adopted Vision 2010 as a goal for the next decade. Subsequently, State and Area Agencies and I&R/A providers have collaborated in setting priorities, enhancing program coordination, and securing resources to move towards a modernized aging information resource system. This self-assessment guide is designed as a practical tool to help state aging networks determine and enhance their progress in achieving Vision 2010.

The Vision

A fully integrated system linking the extraordinary breadth of consumer information available today is vital to empowering older Americans.

To ensure that consumers have access to all the information needed to make informed decisions, the Older Americans Act information system of the 21st century will have to re-conceptualize those information and assistance models that have driven them in the past.

Knowledge is accelerating at a remarkably fast pace. If we are truly going to encourage consumers to act more effectively in their own behalf, information resource systems will need to find ways to better harness and share the collective knowledge base that we have.

NASUA envisions that the Older Americans Act information and resource system will be easily and universally accessible, the best and most comprehensive source of information for older Americans, their families, and the public. This will be achieved by:

- **LEADERSHIP**—With the Older Americans Act network at the national, state and local levels taking a proactive role in responding to increases in demand for information and related services.

- **COMPREHENSIVENESS**— So that the aging information resource system becomes, in essence, a one-stop shopping source for consumers.

- **RESPONSIVENESS**— To better serve the diverse population of older consumers and their families by attending to the wide range of special needs and interests they represent.

- **INTEGRATION** — Establishing linkages with programs in aging, health and educational institutions, state and community service agencies, the federal government, and business to promote seamless information delivery.

- **ADEQUATE FUNDING**— With increases commensurate to increasing needs and demands for services by a growing number of older persons and their families.

- **SKILLED PERSONNEL** — Sufficient in number, to meet the anticipated number of requests for information and to provide counseling, decision-support, and advocacy assistance appropriate for empowering consumers.

- **TECHNOLOGY** — To maximize communication and reach greater numbers of user audiences cost-effectively.

- **MARKETING** — To ensure all older Americans and their families understand – and have access to – the information resource system.

- **KNOWLEDGE BUILDING** — To effectively harness the capacity of the entire information resource system to make data and information useful for planning, enhancing aging services, anticipating future problems, and training personnel.

Strategic Directions: Determining Your Stage of Development

This self-assessment guide is a tool for determining the progress of your agency in achieving Vision 2010. While it offers strategic goals for future planning, it does not prescribe a plan of action your state or area agency should take. All aging agencies are encouraged to refine these targets in the context of existing structures, policies, and strategies. Based on Vision 2010, nine strategic goals are and corresponding indicators are detailed in the following pages. The strategic goals are:

1. Comprehensiveness
2. Coordination or Integration
3. Technology
4. Quality
5. Human Capacity
6. Marketing & Outreach
7. Adequate Funding
8. Knowledge Building
9. Leadership

This guide provides state and area agencies on aging and local aging network Information and Referral/Assistance (I&R/A) programs an opportunity to assess their I&R/A program to determine their progress in achieving Vision 2010. The user may choose to go through the strategic goals in the order in which they are presented or may choose to prioritize the strategic goals based on their agencies unique needs. Users will note that some indicators for a strategic goal refer to the I&R/A service while others relate to the aging information resource system which encompasses the I&R/A program as well as the other programs that have an information and assistance function.

Rating scale:

1 = We haven't begun to work on this yet

2 = We are in the early stages of our efforts in this area

3 = We've made significant progress here

4 = We're almost there

5 = We can be used as a model in this area

It is important to note that the indicators for each goal are designed to assist a broad range of governmental and non-governmental agencies. Consequently, select those indicators applicable to your organization, designation, structure, and role.

Strategic Goal 1: Comprehensiveness

A comprehensive, coordinated statewide aging information resource system can help to ensure a "one-stop shopping" experience for older consumers and their families wherever they live.

Indicators	***Rating***	***Action plan, Next steps***
1. Information and Referral/Assistance serves as the primary or key source of information, support, and assistance on issues concerning older adults and their caregivers.		
2. A comprehensive I&R/A database has been created for storing and retrieving appropriate and inter-related services, supports, and resources. In addition to traditional aging service providers in the community, the database incorporates the information related to: A. Other aging programs administered by the state or contracted entities: ■ ombudsman, ■ state health insurance counseling program ■ elder abuse/adult protective services ■ legal services, ■ home & community based services ■ family caregiver support program, ■ Alzheimer's programs ■ adults with disabilities programs, ■ Medicaid ■ state pharmacy assistance programs ■ other programs, specify: _____ B. Other national, regional, state resources for older persons and caregivers -- - national numbers: i.e., Medicare, Eldercare Locator, Social Security Administration, Administration on Aging, etc. - regional or state special purpose numbers: i.e., statewide elder abuse hotlines, legal assistance hotlines, state pharmacy assistance programs, etc.		

Indicators	*Rating*	*Action plan, Next steps*
3. In addition to traditional aging service providers in the community, the database includes a full complement of: ■ public and non-profit providers - i.e., employment, public housing, caregiver support groups, disease-specific organizations, ethnic and culturally specific resources, health promotion/disease prevention, etc. ■ private, for-profit providers - i.e., assisted living, private case management, pharmacies/grocery stores that deliver, financial counselors, elder law attorneys, retirement planning, etc.		
4. The database contains information resources to assist in accessing ■ services for other populations - i.e., resources for persons with disabilities, kincare resources, older persons with adult children with disabilities etc. ■ resources related to educational opportunities, senior membership organizations, recreational programs for older persons, etc.		
5. The database is updated regularly.		
6. Database inclusion and exclusion criteria have been reviewed and updated to reflect the needs of the increasingly diverse older population and their caregivers.		
7. The aging I&R/A services uses the same software statewide/areawide or have interface capability across the various software used across the state/area.		
8. The I&R/A program has 24-hour access either directly or through referral to a 24-hour service after normal operating hours.		

Strategic Goal 2: Coordination or Integration

To better respond to public need, and to streamline service to the community, the aging information resource system proactively promotes coordinated and, where possible, integrated information and assistance resources.

➢ Within the Aging Service System

Indicators	*Rating*	*Action plan, Next steps*
1. Strategic plans and performance goals place a priority on "one-stop shopping."		
2. Organizational realignments or linkages have been made to facilitate one-stop shopping by older persons and their families.		
3. The aging information resource system has been designed/ redesigned as a single point of entry system or as a well coordinated multiple point entry system.		
4. The comprehensive I&R/A database is accessible to other programs administered by the aging network: ▪ ombudsman, ▪ state health insurance counseling program, ▪ elder abuse/adult protective services, ▪ legal services, ▪ case managers in home & community based service programs, ▪ family caregiver support program, ▪ Alzheimer's programs ▪ state pharmacy assistance programs ▪ adults with disabilities programs, ▪ other programs — specify_____		

Indicators	*Rating*	*Action plan, Next steps*
5. Close working relationships exist between the aging I&R/A and other aging programs - i.e., home and community based services, adult protective services, state health insurance counseling program, legal services, family caregiver support programs, ombudsman, Alzheimer's programs, state pharmacy assistance programs, adults with disabilities programs, etc. - I&R/As receive regular training on each of the other aging programs. - I&R/As have a clearly defined, distinct role in providing information/assistance and protocols for referral to each specialized aging program. - Specialized aging programs receive training on the role of I&R/A in providing information and assistance to consumers and the protocols for referral to the specialized program. - Specialized aging programs have received training in fundamental skills related to counseling and assistance with older persons and their caregivers. - I&R/As and the specialized aging programs have a designated liaison to ensure effective coordination.		
6. As part of a strategic approach for integrating databases, I&R/As and specialized aging programs use a common Taxonomy.		
7. The client tracking system, including the client assessment tool, are integral components of the computerized database.		

➢ With the Larger Universe of Information Providers

Indicators	*Rating*	*Action plan, Next steps*
1. The aging I&R/A program and the broader aging information resource system have effective interagency collaborations with governmental agencies for referral, database update, and resource purposes: ▪ public health ▪ human services ▪ Medicaid ▪ transportation ▪ disaster assistance ▪ mental health ▪ housing ▪ other		
2. The aging I&R/A program and the broader aging information resource system maintains effective collaborations with non-profit organizations for referral, database update, and resource purposes: ▪ hospitals and clinics ▪ emergency services ▪ shelters ▪ Red Cross ▪ crisis intervention organizations ▪ other		
3. As part of a strategic approach for linking with the larger universe of information providers, the aging information resource system uses the InfoLine Taxonomy.		
4. The aging information resource system keeps partners informed about appropriate training, technology, data sharing and resource needs.		
5. Aging I&R/A shares or provides its resource database though subscriptions or other mechanisms with other health and human services entities—i.e., hospitals, one-stop career centers, veterans programs, etc.		

Indicators	*Rating*	*Action plan, Next steps*
6. Aging network agencies are involved in the design, development, and implementation of statewide and local 2-1-1 call centers, including shared databases, to enhance access to services for older persons and their caregivers.		

Strategic Goal 3: Technology

Advanced information technology can assist in maximizing communications to reach greater numbers in the most cost-effective fashion and is therefore an integral component of information and referral.

Indicators	***Rating***	***Action plan, Next steps***
1. Older consumers and their families can easily access I&R/A by telephone. - Toll free numbers - Accept out of area/state collect calls - Language lines		
2. Older consumers and their families can easily access other aging information resource system programs—ombudsman, state health insurance counseling program, adult protective services, legal services, case managers in home & community based service programs, family caregiver support program, adults with disabilities programs, and other relevant programs. - Toll free numbers - Accept out of state/area long distance calls - Fax - Language lines		
3. Technology is available and utilized for assessing the needs of older persons and caregivers requesting information and assistance; client tracking; measuring the effectiveness of service delivery.		
4. A strategy is in place for modernizing the infrastructure of the information resource system to support and take advantage of a broad range of computer technologies: ■ Computerized databases, ■ Internet and extranet ■ E-mail ■ Listservs and Chat rooms ■ Web based learning ■ Computer access at senior centers ■ Computer kiosks in public places ■ Web based searchable resource database		

Indicators	*Rating*	*Action plan, Next steps*
5. As part of the priorities for modernization, the state and area agencies on aging have a high-speed, menu-driven Web site with links to other sites. The Web sites are designed to be consumer friendly: ▪ Information posted is well written ▪ Format is easy to understand ▪ Navigation is simple, allowing visitors to move through the site easily ▪ Color and font size are appropriate for older persons		
6. Web pages comply with the Federal requirements for accessibility for persons with disabilities. Graphics, for example, are accompanied by narrative descriptions that allow persons with a visual impairment to use text-to-voice software.		
7. Clearly formulated, written security/privacy policies protecting client anonymity are in place and apply to telephone, computerized and web based systems. These policies are regularly reviewed.		

Strategic Goal 4: Quality

The aging information resource system has a commitment to provide high quality service for seniors and their families.

Indicators	*Rating*	*Action plan, Next steps*
1. The I&R/A and related programs comprising the aging information resource system are consumer-oriented and mission driven.		
2. The I&R/A program has adopted the AIRS Standards for Professional Information and Referral and/or standards developed by the State Agency on Aging.		
3. A strategy is in place to encourage I&R/A program directors to secure the AIRS certification in aging.		
4. Quality assurance mechanisms—call monitoring, consumer satisfaction survey, others—are in place to regularly assess if the aging information resource system is delivering consistent high quality service. Channels exist for reporting problems and concerns.		
5. Performance measures, such as those being created by the AoA Performance Outcome Measurement Project, are being utilized.		
6. The aging information resource system provides culturally sensitive service to all people who seek assistance.		
7. Consumer satisfaction surveys, performance outcome measures, and other quality assurance mechanisms help guide staff training and development activities.		
8. There is an on-going, systematic process for quality improvement. Evaluation is an integral part and a continuing activity for each program of the aging information resource system.		
9. All aging information resource system personnel are committed to, participate in, and share in the accountability for quality.		

Strategic Goal 5: Human Capacity

The aging information resource system engages well-trained, knowledgeable, motivated and committed staff and volunteers sufficient to meet the requests for information and to provide counseling, decision support and advocacy.

Indicators	***Rating***	***Action plan, Next steps***
1. The I&R/A service has adequate staff—paid and/or volunteer.		
2. Other programs comprising the aging information resource system have sufficient paid and/or volunteer to fulfill their information and assistance function.		
3. The information and assistance roles, skills, competencies, expectations, and expertise required are clearly defined for: ▪ I&R/A services ▪ Ombudsman program, ▪ state health insurance counseling program, ▪ elder abuse/adult protective services, ▪ legal services, ▪ case managers in home & community based service programs, ▪ family caregiver support program, ▪ adults with disabilities programs, ▪ other programs—specify_____		
4. Paid and volunteer I&R/A staff are given the information, resources, and authority to effectively serve older consumers and their families.		
5. I&R/A staff understand consumer needs and are adequately trained and prepared for their job functions. Regular and progressive levels of training are provided for staff to expand knowledge of the full range of aging programs, other human service programs, and to develop new skills.		
6. Other program staff in the aging information resource system (case managers, ombudsman, etc.) are trained on basic information and referral skills.		

Indicators	*Rating*	*Action plan, Next steps*
7. A comprehensive I&R/A training curriculum has been adopted or developed statewide/areawide.		
8. Staff of all programs in aging information resource system receives regular and progressive level of training to build and maintain cultural competence.		
9. The I&R/A services and other programs in the aging information resource system have multi-lingual staff, utilize language lines, TTY/TDD, or other services to assist: ▪ linguistically diverse clientele ▪ persons with disabilities		
10. I&R/A staff is encouraged and assisted to pursue the nationally approved Alliance of Information and Referral systems (AIRS) Certified Information and Referral Specialist in Aging (CIRS-A) program.		
11. The AIRS CIRS-A Competencies and Study Guide is used as a tool for I&R/A staff development.		
12. The staff of I&R/A services and other programs in the aging information resource system is adequately trained to assess and respond to the needs of caregivers, as well as those of older persons.		

Strategic Goal 6: Marketing & Outreach

The aging network recognizes the aging information resource system's vital role as a consumer information gateway and understands it is imperative to reach out to all citizens – including racial and ethnic communities, people with disabilities, and under-served populations.

Indicators	***Rating***	***Action plan, Next steps***
1. The I&R/A services and other programs in the aging information resource system share a common goal and accountability to empower older consumers and their caregivers.		
2. The I&R/A service and other programs in the aging information resource system maintain an on-going, updated, and coordinated plan for marketing/ outreach. It is regularly monitored and revised.		
3. The aging information resource system partners with and coordinates marketing and outreach efforts with a range of other entities: ■ aging programs in different geographic areas ■ other human service organizations ■ health care organizations ■ faith based organizations ■ organizations representing minority and ethnic populations ■ businesses and business organizations ■ universities ■ unions ■ other		
4. The strategic, coordinated outreach plan includes special efforts for targeting: ■ limited English-speaking persons ■ minority and ethnic groups ■ rural older persons ■ family caregivers ■ homebound older persons ■ gay/lesbian older persons ■ other under-served populations		

Indicators	*Rating*	*Action plan, Next steps*
5. The I&R/A service and other programs in the aging information resource system jointly publish consumer information materials.		
6. Consumer information materials are translated into diffe rent languages, as appropriate, for communicating with diverse groups of older persons and caregivers.		
7. The I&R/A service and other programs in the aging information resource system participate in joint events with key targeted groups when appropriate.		
8. The I&R/A telephone number is promoted using a variety of mediums – newspapers, direct mail, radio, bus billboards, Internet, etc.		
9. The Eldercare Locator is promoted for long distance caregivers.		
10. The aging information resource system has adopted a basic, consistent visual identity, which is customized by each of the programs.		
11. Plain language resources are available for low-literate older persons and caregivers from the I&R/A service and other programs in the aging information resource system.		

Strategic Goal 7: Adequate Funding

Aging information resource system partners have a comprehensive, long-term strategy and plan for resource development.

Indicators	*Rating*	*Action plan, Next steps*
1. State and Area Agencies have a multi-year strategic plan with priorities for systems improvements aimed at achieving a Vision 2010 aging information resource system.		
2. State and Area Agencies on Aging seek adequate funding for the aging information resource system by: ▪ re-directing current resources ▪ tapping existing funding sources, i.e., NFCSP, Medicaid, SSBG, etc. ▪ securing new resources — --Federal support --State funding --Local government support --foundation funding --corporate giving --other		
3. To enhance capacity and maximize resources available to the aging information resource system, partnerships have been developed: ▪ between aging I&R/A and other aging programs ▪ with other I&R/A systems, ▪ with local/state 2-1-1 ▪ with other public agencies, ▪ with private sector entities.		
4. Cost-sharing agreements for database maintenance, resource directories, or other appropriate services are solicited with appropriate public agencies.		
5. Contracts with other systems for provision of databases, resource directories or other appropriate services are developed.		
6. Subscriptions for the I&R/A database and regular updates are developed with hospitals or other appropriate entities.		

Strategic Goal 8: Knowledge Building

The aging information resource system is committed to collecting reliable information and sharing it with policymakers, aging network and other government agencies, service providers, communities, and other relevant entities in a timely fashion.. The two major components of this commitment are data collection and data sharing networks.

Indicators	***Rating***	***Action plan, Next steps***
1. The I&R/A and other programs in the aging information system routinely collect information on the types of inquirers, their identified needs, and the effectiveness of services.		
2. All programs in the aging information resource system recognize the critical role and importance of data collection and sharing as a way to improve planning and service delivery.		
3. The technology is available to seamlessly access and share client and service data across programs in the information resource system.		
4. A statewide/areawide system is in place to collect and regularly analyze data from each program in the information resource system to: ▪ develop a profile of inquirers served ▪ determine service gaps, ▪ identify unmet needs, ▪ determine the level of service(s) required to meet need; ▪ assess the effectiveness of services, ▪ identify emerging needs among older persons and caregivers.		

Indicators	***Rating***	***Action plan, Next steps***
5. A statewide/ areawide integrated data collection system is in place across <u>all</u> programs in the information resource system and is used to regularly analyze data to: ■ determine priority issues for systems advocacy; ■ provide on-going needs assessment information; ■ support development of responsive state/ local plans, and ■ present to the general public, public policymakers and/or private sector funders.		

Strategic Goal 9: Leadership

Aging network leadership has the ability to create and implement the vision, build consensus, plan and set priorities, and secure resources to ensure a strengthened aging information resource system.

Indicator	*Rating*	*Action plan, Next steps*
1. State and Area Agencies on Aging assume a strong leadership role in promoting a comprehensive, consumer-centered information resource system with I&R/As, other aging programs, and other relevant entities.		
2. State and Area Agencies have a clear and compelling picture of the essential role and changing scope of services of the aging information resource system.		
3. State and area agencies on aging have developed a multiyear plan with cost estimates for achieving the goal of creating a comprehensive information resource system as outlined in Vision 2010.		
4. SUA and AAA leadership work in concert in goal-setting, planning, designing and executing strategies for achieving Vision 2010.		
5. State and Area Agencies on Aging assume a strong leadership role in developing the necessary partnership, both public and private, to build common agendas, leverage resources, share expertise, and expand services as needed to achieve Vision 2010.		
6. Leadership communicates that high quality is expected and creates opportunities and support improvement efforts throughout the system.		
7. At the national, state and local levels, the leadership advocates for legislation and policies that fund and support the aging information resource system.		