

CONNECTIONS TO COMMUNITY LIVING SUSTAINABILITY INITIATIVE OPERATIONAL GUIDE SERIES #2

Topic: Best Practices for Outreach to Residents of Nursing Homes

INTRODUCTION

This document provides Aging and Disability Resource Centers (ADRCs) with strategies and tools for providing outreach to nursing home residents, providers, stakeholders and the community regarding opportunities for community living. Most of the ideas within this document are current practices collected from ADRCs. Replication of these promising practices across the State will help to ensure that: individuals living in nursing homes across the state are aware of options to live in less restrictive community settings; increased consistency of service delivery and customer experience; increased relocations; and reduced Medicaid expenditures.

BEST PRACTICES FOR OUTREACH TO NURSING HOME RESIDENTS

A. DO YOUR RESEARCH

Knowing specific features of each nursing facility can assist the ADRC in focusing outreach activities to individual facilities and residents.

1. Know the location of every nursing home in your ADRC service area.
2. Know how many residents are in each (the number of beds).
3. Know how many residents are on Medicaid and their payor-mix.
4. Know the facility occupancy ratio (e.g. the number of empty beds).
5. Know the age range of residents and how many are over and under 65.
6. Know the facility's quality history.
7. Understand the mission of each nursing home. Some facilities' missions are solely for rehabilitation. These facilities begin discharge planning at admission. This provides a perspective for the ADRC when working with the facility and its residents.
8. Know the acuity levels of residents (e.g. the facility's 'case mix').
9. Gather data that shows the length of stay of residents in the nursing home.

B. DEVELOP RELATIONSHIPS WITH RESIDENTS AND STAFF

Developing positive relationships with residents and staff is vital to the success of relocation efforts. Having a regular presence in nursing homes is critical for building these relationships.

1. Be present in area facilities. Visit them regularly.
2. Develop a local plan that describes the ADRC staff outreach, including which facilities and when. This may include the ADRC's information and assistance staff, marketing staff, the ADRC director, and/or benefit specialists. Some ADRCs assign one staff person to each nursing home. This helps with building relationships and becoming a familiar face around

- the facility. In other areas, rotating staff works well, as it offers another friendly face with the same message and helps manage staff workload.
3. Know the nursing homes' preferences on protocol. Wear a name badge, check-in at the front desk to let them know you are there. Call ahead to make sure people know you are coming.
 4. Frequently attend meetings with the social worker(s) and/or discharge planner(s) at the nursing home. Talk to them about the initiative and the role of the ADRC with both long-term and short-term residents. Develop a strategy for on-going communication, referral processes, and identifying opportunities for meeting with residents.
 5. Don't forget that nursing home workers know resident needs, have worked with residents, and have built relationships with them. Don't forget to ask them for assistance, for their point of view, and for ways in which the ADRC can be helpful to them. Ask them what they see as barriers to relocation and the opportunities they see for improving current processes so that residents can relocate to the community.
 6. Nursing home staff play a key role in planning for a person's return to the community. Encourage social workers to contact the ADRC if there are complications with discharge planning, for example, finding transportation or home delivered meals. Encourage contacts to the ADRC when people are considering out-of-home care prior to entry. Share tools and resources which may also be helpful to nursing home discharge planners. Respond to their requests for your assistance in a timely way. Your roles are different, but related. Be clear about your differing roles while identifying the mutual benefits of working collaboratively with each other.
 7. Invite nursing home social workers to attend ADRC staff meetings. This can provide a forum for additional communication, problem-solving, and relationship-building. They might be interested in learning more about what you do, beyond providing services to nursing home residents.
 8. Provide training/education to nursing home staff. This can have a broad scope. One ADRC provided Medicare Part D training to nursing home social workers. Another ADRC held an information-sharing luncheon meeting at a nursing home and invited all the nursing home social workers in the county. The event was well-attended.
 9. Develop relationships with other staff who work in the nursing home. Facility staff that regularly interact with residents can be excellent advocates.
 10. High turnover in some nursing homes may make relationship building a challenge. However, if the ADRC develops a process for regular contact, visits, and education opportunities, perhaps this barrier can be overcome.

C. MDS-SECTION Q REFERRALS

ADRCs are the local contact agencies for receiving MDS-Section Q referrals from nursing homes. The referrals are sent for individuals that express an interest in receiving information about community placement.

1. The ADRC should follow-up on Section Q referrals as soon as possible. These are people who have shown an interest in relocating. Waiting too long can make them lose interest, enthusiasm, or trust in the 'system'.

2. When responding to MDS-Q referrals, be sure to connect with staff as well as the residents. This helps to build relationships and support relocation efforts.
3. Follow-up with nursing homes that are not referring people via this system.
4. Develop a flyer to e-mail to the social worker in the nursing home that lets him/her know the time and place where the ADRC staff will be at the nursing home for informational meetings. This helps when the social worker is very busy. Ask him/her to post the flyer for residents to see.
5. Try to have as many people in the resident's life attend the meeting/appointment in response to MDS-Q referral. This way, the person's support network will hear all the same information and be able to ask questions. The anxiety on the part of the resident and his/her family can be minimized if everyone is there at the same time.

D. GIVE PRESENTATIONS

1. Arrange and provide presentations regarding community relocation to residents and family members. Involve the nursing home social worker in publicizing the meeting(s).
2. Every facility is required by licensure/statute to have resident councils. Attend resident council meetings and present information. It is recommended that the ADRC contact the resident council president first, to discuss what you'd like to talk about and whether you could be a part of the agenda.
3. Attend family council meetings to provide information on options available. Be available to talk to families afterwards.
4. Presentations may be broader than relocation opportunities. For example, health-related topics, prevention, Medicare, and long term care services and supports might be of interest. This allows for ADRC visibility and builds trust between the ADRC and residents. This may help when the ADRC talks with residents about relocation. Include Elder Benefit Specialists and Disability Benefit Specialists in outreach/relocation activities. Presentations by benefit specialists are often well attended.

E. MAKE INFORMATION AVAILABLE TO RESIDENTS AND FAMILY MEMBERS

1. Develop consumer-friendly information that describes relocation opportunities in a positive way.
2. Place brochures on tables in the nursing home that family members can pick up. Be sure these supplies remain well-stocked.
3. Ask to place an article in the nursing home's resident newsletter. Request to have an on-going column or section where updates can be provided and/or stories about successful relocations can be shared.
4. Make resource directories available to residents that describe all the alternatives available in the community.
5. Ensure that nursing home providers have copies of the resource directory. The ADRC should plan for this when printing copies of the directory.
6. One ADRC has developed packets specifically for private pay nursing home residents. The packet includes information about providers and their rates, key things for staff to talk about, and a private pay cost comparison sheet.

F. SHARE THE POSITIVE EXPERIENCES OF OTHERS

The stories of others can provide a powerful tool for helping residents imagine their own possibilities and show real-life examples of how others overcame barriers.

1. Bring residents back to the nursing facility after they transition back to the community. They can bring along pictures of their house or apartment, pets, new friends, and activities they are engaged in around the community.
2. Ask a person who successfully relocated to write a brief article about their experience and ask for it to be published in the nursing home's newsletter.
3. Take note of the relationships between residents. Some people may be reluctant to move out of the nursing home because of the positive relationships they've built with other residents. However, a friend within the nursing home can also be person's greatest advocate for relocation. Discuss and plan for ways in which the relationship can be maintained after relocation. Perhaps the person who moved to the community could come back to the nursing home and share their story while meeting with friends.

G. FOLLOW UP

Following up with residents, families, and providers assures a successful relocation. If you leave information with a resident, you begin to generate interest. Follow-up provides an opportunity to reconnect, answer questions, address concerns of skeptical family members and continue conversations about community relocation.

1. Follow up with people you visit in the nursing home one week later (or at a time preferred by the resident/family).
2. Follow up with people with whom you leave a brochure.
3. When you do a presentation at the nursing home, ask people to write their name on a registration sheet if they'd like to talk more with the ADRC. Follow-up with those who are interested.
4. Follow up with facility staff after a successful relocation, thank them for their help. Talk about how things worked for a particular relocation and plan for any needed improvements together.
5. Follow up with people who you help relocate to the community. See how they are doing and ask whether there is anything additional that the ADRC can assist with. For people who enroll in managed care or IRIS, follow up with the program to see how things are going, as time permits.

BEST PRACTICES FOR OUTREACH TO THE GENERAL PUBLIC...*In Regard to Nursing Home Relocation***A. MAKE INFORMATION AVAILABLE TO THE GENERAL PUBLIC**

Every day, people are considering options and making decisions about what to do for a parent, child, or other loved one that has a long term care need or disability. You never know when or where a message about in-home options or nursing home relocation will find

someone at the exact moment when they need it. Therefore, it is important for the ADRC to market and outreach to the general public about options for community relocation.

1. Develop an “e-newsletter” and distribute it widely. Encourage recipients to forward onto friends and family and encourage them to sign up for the distribution list. The newsletter could have a number of different articles within it such as “My mom wants to leave the nursing home, how does she do it?”
2. Insert an ADRC newsletter or other printed material into the “Buyers Guide” which reaches every address in the area.
3. Place brochures about nursing home relocations throughout the community, not just within the nursing home.
4. Write an article suitable for publication about a person who transitioned, the transition program, and how transition services can be accessed for a large circulation newspaper, a senior magazine, and any other publication read by your target population and the general public at large.

B. COMMUNITY MEETINGS/COMMITTEES

1. In some areas, ADRC staff belong or participate in professional network meetings or community meetings also attended by nursing home social workers or other staff. This provides an opportunity to let the nursing home social workers and administrators know about the ADRC. This may be helpful in developing relationships.
2. Attend nursing home social worker regional meetings to share information about the ADRC role.
3. ADRCs discuss nursing home relocations at many community events/meetings, including: long term care coalition meetings, Community Care Task Force, Northshore Networkers, Aging Consortiums and other local organizations where nursing home staff are present.

C. GIVE PRESENTATIONS THROUGHOUT THE COMMUNITY

1. Offer presentations for the general public to attend, so they can learn about long term care options before moving a family member to a facility or to learn how to relocate a loved one who would like to leave the nursing home.
2. Do an interview about nursing home relocations with your local radio or TV station.
3. Give presentations to churches, synagogues, temples, mosques, and other faith-based groups.
4. Give presentations at veteran’s events, senior centers, community fairs, health or senior events/expos.

BEST PRACTICES FOR DEVELOPING AND MAINTAINING PROFESSIONAL PARTNERSHIPS

There are many community partners are that residents and families interact with on a regular basis or when a long-term care or healthcare need arises. Having these partners engaged and knowledgeable about community opportunities can go a long way in getting your message out and getting people connected with the ADRC.

A. INCOME MAINTENANCE

1. One ADRC works with local income maintenance (IM) workers and requests that they send an information sheet about relocation opportunities and the role of the ADRC to every person/guardian/power of attorney of a new MA applicant who is residing in a nursing home.
2. Encourage distribution of written materials at annual Medicaid disability renewal as well.
3. Work with IM consortia, those who have more centralized functions, to determine whether there are any similar opportunities for relocation information sharing.

B. OMBUDSMAN

1. Maintaining positive relationships, communication and collaboration with ombudsman program staff can be helpful. If a person they may be working with were to express interest in moving, they can let the ADRC know.
2. The Ombudsman's role is to provide education, referral and reduce or eliminate barriers with families, residents and nursing facility staff.
3. Ombudsman know the culture of the nursing home and some of the family dynamics of the residents. This may be helpful to the ADRC.

C. MEDICAL PROFESSIONALS

1. Consider outreach to Emergency Medical Technicians and ambulance personnel to share ADRC information. Train EMTs and ambulance personnel about the services of the ADRC and how they might be able to connect people and/or the families of people experiencing a medical event or that are in crisis.
2. Social workers in hospitals, including emergency room personnel, could refer people before they enter a nursing facility, as well as people who need nursing facility care on a short-term basis that could transition after a short stay if the ADRC can help them address a barrier that would otherwise keep them from going back home.
3. Give a workshop or session at a conference for physicians, nurses, hospice providers, nursing home administrators, CNAs, disability groups, senior groups, lawyers, or anyone else who interacts with your target populations. Give them brochures they can share with their patients or clientele.

D. OTHER PROFESSIONALS

1. Financial planners, guardians (both public and family), elder law attorneys and attorneys who work with people with long term care needs.
2. Talk to state and local elected officials about the program. Take them on a visit to those who transitioned to the community. They may be contacted by a constituent with long term care needs; if familiar with the ADRC and community opportunities then they can make referrals.
3. Give presentations to churches, synagogues, temples, mosques, and other faith based organizations. Put articles in church bulletins regarding the ADRC and the services offered.

BEST PRACTICES FOR DEVELOPING AN OUTREACH PLAN

This document provides many ideas for outreach to residents, providers, and the general public in regard to relocations. Each ADRC is expected to have an outreach plan. Developing an outreach plan can help the ADRC structure its outreach activities in a logical way and target activities to where they are needed the most.

An outreach plan can also help promote involvement, and serve as a public demonstration of the ADRC's commitment to work with stakeholders in a positive way, leading to strong and productive partnerships that allow the agency to further its goals. Below is an outline that you can use to create an outreach plan.

1. **Define your goals and objectives.** Goals may be unique to a specific group. They may include setting a number of relocations your ADRC wants to facilitate.
2. **Identify your target audience(s).** Nursing home residents, families and facility staff are different audiences requiring different messages. Also identify your community partners. This includes agencies, groups, or people that have similar missions or mandates to those of the ADRC. Identify new ways to work with them to achieve your mutual goals in regard to this particular effort. Identify other opportunities that already exist that can be used to deliver your message. It's beneficial to break your target audiences down into small groups so that you can create a message that will resonate with each group.
3. **Create your message.** After defining who your target audiences are, craft a message designed to achieve your objectives. Tailor the message to the audience and to what that group values. Avoid the use of acronyms or complicated words that may confuse or overwhelm people. Make your message positive for all audiences. Research shows that positive messages are more effective in changing people's habits than negative ones.
4. **Package your message.** Messaging can take many forms, such as, flyers, brochures, an article in a local paper or within a nursing home newsletter, or a statement on a webpage. Tailor your materials to the different types of learners (visual, audio, and kinesthetic). Define what you will produce, what you plan to do, and who will be responsible for associated tasks.
5. **Distribute your message.** Plan for the distribution of your outreach materials and messaging strategy. Define roles, materials, activities, timelines and locations of outreach actions.
6. **Evaluate your plan.** Evaluate the outcome of your efforts. Compare your results to your objectives. Determine any adjustments that need to be made for the future.

*Reference: "A step-by-step guide: creating an outreach plan." Family Pride, Washington, DC.

ADDITIONAL INFORMATION

Office for Resource Center Development Contact:

Regional Quality Specialist(s) or send an email request to DHSRCteam@wisconsin.gov.