

SAMPLE MOU
Aging & Disability Resource Centers and 211 Providers

Background:

The following sample Memorandum of Understanding (MOU) is provided as a guide for communication between ADRCs and the 211 provider(s) in their area. MOUs should reflect the mission and scope of each organization. National standards for the profession of information and referral/assistance call for MOUs between different organizations. These agreements need to reflect clear understanding of the agencies involved and may be assisted through going monitoring, discussion and evaluation.

211 provides an information and referral for general human service and community information to all ages. The ADRC provides specialized information and assistance for adults over 60 years of age with any disability, adults 18 and over with physical disabilities, adults with developmental disabilities and mental health/substance abuse, and family caregivers who need in-depth help identifying their service needs and finding services to address them.

ADRCs are encouraged to also develop MOUs with other specialty I&R providers (e.g., disease specific, crisis, volunteer centers etc.) in addition to 211 organizations.

Information provided below is intended to support discussion and the development of individualized MOUs that support agreements between agencies. This document should be customized for local use. In addition in situations where resource database collaboration occurs, a separate data sharing agreement should be in place.

Memorandum of Understanding
Between
ADRC of _____
and
211 of _____

Purpose

The purpose of this memorandum of understanding (MOU) is to outline how the ADRC of _____ and the 211 _____ work together to improve the system of information and referral/assistance, and assure people are connected to the service that best fit their needs.

The ADRC's Role in serving _____ County

Aging & Disability Resources Centers are a central source of specialized information, assistance and access to community resources for older people and adults with disabilities as well as their families. Personalized assistance is available at the ADRC, over the telephone or in visits to an individual's home.

The 211's Role in serving _____ County

211 provides general information and referral services over the phone linking people to community resources and specialized information and referral/assistance providers.

The ADRC/211 Partnership

As part of the Information & Referral Network and in fulfillment of professional standards, ADRCs and 211s work together to ensure that people receive the information they need to meet their needs. Participation in this memorandum of understanding is voluntary and supports a shared understanding of the roles of each organization.

Referral Protocols (Note: ADRCs and 211s will want to modify detail information provided in this section to reflect the goals, mission and target audience of each organization.)

In partnership ADRC and 211 have agreed on the following referral protocols to follow if an **older adult or an adult with a disability or someone who is concerned about an older adult or an adult with a disability** contacts 211.

Issue	Action
Abuse and Neglect of Vulnerable Adults	Refer or warm transfer to ADRC
Advocacy	Refer or warm transfer to ADRC
Adaptive equipment	Refer or warm transfer to ADRC
Adult Family Home	Refer or warm transfer to ADRC
Assisted Living	Refer or warm transfer to ADRC
Alzheimer's disease and related dementia	Refer or warm transfer to ADRC
Benefit questions, denial etc.	Refer or warm transfer to ADRC
Dementia	Refer or warm transfer to ADRC

Issue	Action
Disability	Refer or warm transfer to ADRC
Education and life enhancement	Refer or warm transfer to ADRC
Employment	Refer or warm transfer to ADRC
Housing	Refer or warm transfer to ADRC
Home repair & maintenance	Refer or warm transfer to ADRC
Home Health needs	Refer or warm transfer to ADRC
Health issues	Refer or warm transfer to ADRC
Insurance concerns	Refer or warm transfer to ADRC
Legal issues	Refer or warm transfer to ADRC
Long-term care needs (including paying for)	Refer or warm transfer to ADRC
Medicare	Refer or warm transfer to ADRC
Medicaid	Refer or warm transfer to ADRC
Nursing Home	Refer or warm transfer to ADRC
Nutrition	Refer or warm transfer to ADRC
Personal Care	Refer or warm transfer to ADRC
Supportive Home Care	Refer or warm transfer to ADRC
Transportation - Specialized	Refer or warm transfer to ADRC
Youth Transition Services	Refer or warm transfer to ADRC
Insert additional issues	Refer or warm transfer to ADRC

In partnership ADRC and 211 have agreed on the following referral protocols to follow if individuals who contact the ADRC are in need of the following:

Issue	Action
After school activities	Refer or warm transfer to 211
Child care	Refer or warm transfer to 211
Clothing needs	Refer or warm transfer to 211
Community events	Refer or warm transfer to 211
Divorce mediation	Refer or warm transfer to 211
Donations – clothing, household items	Refer or warm transfer to 211
Drug abuse prevention –young teens	Refer or warm transfer to 211
Emergency housing for young families	Refer or warm transfer to 211
Emergency food	Refer or warm transfer to 211
General transportation	Refer or warm transfer to 211
Parenting classes	Refer or warm transfer to 211

Young mom's support group	Refer or warm transfer to 211
Insert additional issues	Refer or warm transfer to 211

In addition to the above noted issues, ADRCs will refer individuals to 211 who:

- do not have long-term care needs.
- have a general community resource questions i.e. after school programs and activities, child care questions, clubs and organizations, emergency management.
- is researching general community resources outside the scope of the ADRC (older adults, adults with disabilities and their families).

Training and Communication

ADRC and 211 will strive to create a network of information, referral and assistance for older adults, adults with disabilities and family caregivers that ensures easy access to services. This will be done by providing:

- Quarterly scheduled purposeful communications regarding the status of 211 and ADRC. Frequency of the communication occurs as needed to maintain effective communication and collaboration. Additional meetings scheduled on an as-needed basis. Communication will include:
 - staffing changes.
 - changes to community based services.
 - orientation of new ADRC or 211 employees .
- Providing opportunities for cross-training and joint training and to share information, review referral and confidentiality protocol. Joint training opportunities will be presented at least one time per year.

Period of Review

This MOU will be reviewed annually. Amendments may be considered at any time and enacted based on the consensus of the parties. 211 and ADRCs are encouraged to explore methods to assess and assure the referral protocols are followed and meeting the intentions of this agreement.

Termination

Either party may terminate this agreement with 90 days written notice with or without cause.

This MOU will remain in effect until there is a written notification from either party that there is a need to change or terminate this MOU.

Signatures Reflecting Agreement to the Above:

Name and Title
ADRC of _____

Name and Title
211 _____

Date

Date

SAMPLE