



Report from the Executive Director

Thursday, January 18, 2018

*This quarterly report for FY 2017 includes information for the period
October 1, 2017 through December 31, 2017.*

CARIE LINE

CARIE LINE (CL) responded to 602 callers (consumers, families, friends, and professionals) during this reporting period and assisted consumers with 790 problems. The top three problems included: 1) health insurance counseling; 2) transportation issues; and 3) housing. This quarter CL conducted 20 presentations reaching 435 consumers.

The open enrollment period for Medicare was busy for CL. In November alone, CL had 41 contacts with individuals who were interested in learning more about available Medicare Advantage and Prescription Drug Plans for 2018. The most popular presentation during this quarter was Medicare 101.

Three interns started in CL this fall. One is a first year MSW student from Bryn Mawr who came to CARIE as part of a career change. The second is a BSW candidate from Temple who is also assisting with the PAVE program. Third is an MPH candidate from LaSalle who comes with a strong background in aging services, but is looking to expand her knowledge in policy areas like Community Health Choices.

Elder Homelessness Project:

Last year, CARIE received support for a new project focused on elder homelessness which includes direct assistance and advocacy as well as education and collaboration with aging and homeless providers.

The CL advocate responsible for the project has been reaching out to smaller soup kitchens and community organizations serving the homeless. Through networking, staff have learned that the smaller organizations do not have the staffing capacity to provide resources and assistance to older adults who are experiencing homelessness. These organizations have embraced CARIE and welcome partnering opportunities to provide advocacy and assistance for their consumers.

We will be conducting our first onsite visit with Old Pine Community Center at one of the breakfasts specifically for older adults scheduled on January 28th. We are in the process of scheduling two additional on sites at two other locations in the city.

The final report will be sent to the Samuel S. Fels Fund during the next reporting period but CARIE intends to continue expansion of this project.

**Providing Advocacy for Victimized Elders (PAVE)**

PAVE is an victim assistance program serves older adults over 60+ in Philadelphia. The program provides court accompaniment, arranges transportation to court, assists in filing Crime Victim's Compensation requests, assists with preparing Victim Impact Statements, helps with restitution and more. In addition, the program administers the Elderly Victims Emergency Security Fund (EVESF) to secure the homes of crime victims.

PAVE served **251 victims of elder abuse and crime, including 18 who received new locks and/or doors using the EVESF fund.** Among those having repairs, all reported feeling more secure as a result and were satisfied with the services they received.

The Director of Victims Services, and the Chief of the Family Violence Unit were fired by the new DA. Both staff played a vital role working with PAVE to ensure that older adults receive advocacy services in the courts. Staff works on a daily basis with an Elder Advocate (still in her position) in the DA's Victim Services to coordinate court room advocacy for victims and witnesses 60+. The DA's office provides PAVE with a weekly list of all new elder victims coming through the criminal justice system. We are anticipating that this working relationship will remain the same. We are preparing to meet with the new Director of Victim Services to inform her of our successes and the importance of having dedicated advocates for older adults readily accessible in the court room.

PUBLIC POLICY

On November 3, we sent a letter to PDA Deputy Secretary Terry Barley commenting about a revision to the OPTIONS Program manual that would allow potential consumers the ability to apply directly for OPTIONS (Lottery-funded program) if they are not income, level of care, or asset eligible for Aging Waiver services (Medicaid-funded program). Several years ago, the Pennsylvania Department of Aging (PDA) began requiring all applicants for OPTIONS services to go through the Aging Waiver application process. PDA is now reverting its procedures so that potential consumers of OPTIONS services are not necessarily required to go through the Aging Waiver application process and be denied before being able to apply for OPTIONS services. PDA continues to require mandatory enrollment for those who are eligible.

On November 8, CARIE and other advocates sent a letter about Long-Term Services and Supports (LTSS) assessments and determinations for Community HealthChoices (CHC) participants to Department of Human Services (DHS) Secretary Teresa Miller and copied: Jennifer Burnett, OLTL Deputy Secretary; Kevin Hancock, OLTL Chief of Staff; and, Leesa Allen, DHS Executive Deputy Secretary. In response to the letter, Kathy Cubit attended a meeting on November 28 with fellow advocates and OLTL/DHS staff about CHC's Comprehensive Needs Assessment. A follow-up meeting occurred on December 19 with advocates and Kevin Hancock, now OLTL Deputy Secretary and other OLTL staff.



Public Policy, continued

On November 15, Kathy attended the Pennsylvania Department of Aging's (PDA) 2017 Alzheimer's Disease and Related Disorders (ADRD) Forum in Camp Hill.

On November 20, CARIE submitted comments to CMS in response to its Request for Information (RFI) on the future direction of the Center for Medicare & Medicaid Innovation (CMMI). Comments primarily addressed the guiding principles, both those described in the RFI and additional principles that CARIE believes to be important as CMMI moves forward with any new demonstration. CARIE also emphasized the importance of the State Health Insurance Assistance Program (SHIP) known as APPRISE in PA.

The Senior Support Coalition emailed a letter in support of presumptive eligibility for Waiver home care and adult day services in mid-November to House Health committee members and PHA hand-delivered the letter on November 20.

On November 27, CARIE submitted comments to the Administration for Community Living (ACL) about a proposed revision to its existing data collection related to the National Survey of Older Americans Act Participants (NSOAAP). We urged ACL to retain both sexual orientation and gender identity questions in the NSOAAP.

On December 1, Kathy conducted a conference call with Secretary Osborne, Chuck Quinan, and Adam Rossi from PDA to provide feedback about PA's new website, "PA Link to Community Care" (<http://www.carelink.pa.gov/>). In addition, we provided written comments in response to the call and shared our comments with Erin Raub, Executive Director of the House Aging and Older Adults Services Committee, who had similar concerns about the site.

On December 21, Kathy provided CHC training to the call center and other staff at the Alzheimer's Association, Delaware Valley Chapter.

Kathy Cubit participated in: 1) Two Medical Assistance Advisory Committee (MAAC) meetings; 2) One special MAAC leadership planning meeting; 3) Two LTSS MAAC meetings; 4) Three MLTSS MAAC meeting webinars; 5) Three Senior Support Coalition calls; 6) Three Third Thursday webinars; 7) One National Medicare Advocates Alliance call and 8) Facilitated three legislative committee meetings.



SENIOR MEDICARE PATROL - PA-SMP

CARIE administers the Pennsylvania Senior Medicare Patrol (SMP) program under contract with the Administration for Community Living/Administration on Aging ACL/AoA, a department of the US Department of Health and Human Services (HHS). SMP recruits and trains a corps of retired volunteers to educate peers about fraud in the Medicare and Medicaid programs.

The SMP's outreach numbers are as follows: **87 Outreach events with 3,018 attending. We had a total of 125 interactions with consumers, covering both simple and complex issues.**

The SMP developed new programming on how to read Medicare Summary Notices (MSNs). This information was taught to volunteers at in-person update meetings across the state. Staff is working on developing new consumer education materials targeted to beneficiaries with Medicare Advantage plans, as they do not receive MSNs but rather Explanations of Benefits (EOBs) which differ from MSNs.

The program will change its approach to volunteer recognition— in the past, we hosted luncheons at local restaurants. At the in-person update meetings in November, nearly all volunteers said that they would prefer a working lunch, similar to the update meeting. While they enjoy the luncheons, the update meeting format allows much more relevant discussion. Staff will set up meetings in May at RSVP offices or other pro-bono venue spaces, will provide lunch, and a recognition gift.

The SMP participated in a national volunteer engagement initiative called Stepping Up, where a number of SMPs around the country collaborated to find ways to improve recruitment and retention, and ways to expand volunteer roles.

Program staff created new consumer education materials on the new Medicare card, which will be mailed to beneficiaries beginning in April 2018. Posters and fliers were designed with essential information and have been distributed across the state through senior centers, subsidized senior housing buildings, and other venues. In addition, the program developed a new 3-panel brochure prior to learning that ACL/AoA were about to launch a standardized brochure for all programs in the nation. We will use both brochures until ours are depleted.

Two new volunteers were trained during this period. The project will continue to focus on educating consumers about the new Medicare cards. Staff expects to see an increase in scams as this initiative draws closer.



LONG TERM CARE OMBUDSMAN PROGRAM

The Long-Term Care Ombudsman program is a federally mandated program providing advocates for long term care consumers through which CARIE represents more than 4,000 residents of 150 settings in Philadelphia.

The program conducted **82 visits (to nursing homes, personal care homes, domiciliary care homes and older adult day programs (including the LIFE program) and provided information on various topics to 30 consumers who called the ombudsman.** Ombudsman staff provide consumer rights information and advocacy for those accessing the various covered services including selecting and evaluating care options, admission and discharge rights, right to be free from abuse and neglect, quality of care among others.

The ombudsman program participated in the bi-annual Resident Council President Workshop. This workshop is attended by resident council presidents from all nursing homes in Philadelphia county and is co-hosted by the Philadelphia ombudsman program including CARIE, Center in the Park, and Philadelphia Corporation for Aging. These meetings were initially created by CARIE's ombudsman program.

At the federal level, Phase 2 of the revised nursing home regulations became effective in November while the nursing home industry lobbied hard for a delay to Phase 2. The Consumer Voice penned a letter opposing the delay of the Phase 2 implementations. This letter was signed by 240 national, state and local organizations (CARIE included). CMS decided not to grant an extension of time, however, a moratorium was imposed on some of the enforcement remedies of Phase 2. CMS stated that the purpose of the delay is to educate facilities about specific Phase 2 standards. CARIE along with other local state and national advocacy organizations opposed this moratorium since it will likely impact full implementation of the requirements aimed at protecting the rights of frail elders in nursing homes.

Mark Davis resigned from the ombudsman program effective Dec. 31, 2017 to pursue a full time position in a small law firm assisting older adults. He remains connected to CARIE's network. We are currently looking to fill one full time position in the ombudsman program.



ADMINISTRATION/MANAGEMENT

Development:

CARIE has received several grants since the last Board meeting. The Barra Foundation named CARIE a recipient of its 2018-2019 Barra Award. This prestigious award provides \$50,000 in discretionary funding over two years. In addition, we received a \$50,000 grant from the Independence Foundation to continue our MLTSS advocacy. For several years, the First Hospital Foundation has supported the CARIE LINE with a \$25,000 annual grant. This year, the Foundation awarded CARIE a \$50,000 grant to fund both the CARIE LINE and our MLTSS advocacy.

In January we learned that we were selected to advance to the final stage of the Pew Charitable Trusts' Evaluation Capacity-Building Initiative (ECBI). Through the ECBI, participating agencies will work with consultants to learn how to most effectively use data to maximize impact. This project will be invaluable in our ability to achieve Goal 1 of our strategic plan related to improving our ability to show impact.

We've submitted a Letter of Intent to IMPACT100 Philadelphia seeking funding for our MLTSS advocacy. In addition, we have a pending application to the Pennsylvania Commission on Crime and Delinquency to expand of CARIE's victims services program to include trauma-informed counseling. If funded, the project will likely begin in April 2018. We have requested \$379,568 to fund the project over 30 months. In addition, we have a pending grant proposal with Pew Charitable Trusts for our CARIE LINE for a 3-year renewal beginning 4/1/18 Our request is for \$245,000 and we received \$225,000 for 2015-18. A new application to the PA Commission on Crime and Delinquency is pending. The project is to enhance victim's services for 30 months beginning 1/1/18 (\$379,568)

In the next week we will be submitting grant applications to the Henrietta Tower Wurts Memorial for our Elderly Victims Emergency Security Fund and to the United Way for both advocacy and the CARIE LINE under their application for "Family Stability".

It was noted in an article on Slate.com that less than two percent of corporate, community, and foundation donations go to programs related to aging. Next month, Michele will join the Development Director of the Ralston Center in a meeting with Sidney Hargro, Executive Director of the Philadelphia Philanthropy Network. The Philanthropy Network is a 150-member organization of philanthropies in the Greater Philadelphia region focused on increasing the impact and effectiveness of regional giving. Our plan is to educate the Network about the needs of aging adults and to learn if there are any opportunities to work collaboratively.



ADMINISTRATION/MANAGEMENT, continued

Staff Changes:

As mentioned in the ombudsman report, Mark Davis has left his part time position in the program. In addition, we have had a vacancy since our volunteer coordinator left in early summer. The volunteer duties have been transferred to Jessica Hartfield and we are in the process of hiring a full-time ombudsman to replace the two vacant part-time positions.

We have experienced turnover in our receptionist position. It seems that this is a very difficult position to fill; in part due to the need to master answering phones for two distinct organizations with differing requirements. We recently hired a new receptionist, Sheri Manis, who was placed with SeniorLAW Center by the Senior Employment Program (SEP). She was trained on the job and seems to be doing quite well in the month she has worked for us. We have hired Annie Coleman, a former SEP employee that we previously trained to provided administrative assistance for our PAVE program. She also provides relief at the front desk.

Ariel Rabinovic, an SMP Advocate recently moved to Chicago. He will continue to work part-time with the program remotely. We have just hired another part-time staff person, Sherrie Slade to work in the program. Sherrie has been volunteering with our ombudsman program and she brings experience as a pharmacist and an attorney.

I am most pleased to report that in December we hired Evelyn Dodds as our new Director of Finance and Administration. She started on 1/2/18. She has been very helpful, takes initiative, and loves numbers! This will move us a bit further in achieving our third goal in our strategic plan related to succession planning. As a result, we have cancelled our contract with Core Financial Outsourcing to provide accounting services effective 1/26/18. We are sorry to say goodbye to Laura Skurla who has served us quite well and is helping to make a smooth transition.

Professional programs/meetings/trainings (this list is not inclusive):

- Along with Michele Mathes and Joan Davitt, attended the Leadership Cohort sponsored by the Independence Foundation (the final meeting was held on December 8th)
- In October, attended two meetings of the Department of Justice's Elder Justice Task Force, one in Philadelphia and the other in Harrisburg
- Attended the PA Long-Term Care Council meeting on October 19th
- Attended the Consumer Voice Conference in early November where I received the Elma Holder Founder's Award and moderated a plenary session on sexual abuse in nursing homes



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ADMINISTRATION/MANAGEMENT, continued

- Attended two meetings of the Elder Justice Roundtable in Montgomery County
- As chair of the grievance and appeals committees for two LIFE programs, heard six appeals
- Conducted a training on November for an older adult group in Montgomery County on Scams and how to avoid them
- On November 28, I presented to an older adult group in Philadelphia along with Mrs. Jefferson about CARIE and Medicare fraud
- Attended Advisory Council on Elder Justice in the Courts in Harrisburg, December 12-13

Other:

On Wednesday, October 11th, we held a joint CARIE/SeniorLAW Center (SLC) training from 9:00-2:00 at Blank Rome. More than 90% of staff from each organization attended. This was an opportunity for new staff to become acquainted. The program co-facilitated by CARIE's program manager, Lori Walsh and SLC's legal director, Wendy Bookler was highly interactive. The program included an "icebreaker" to help staff know more about fellow staff and exercises that helped to demonstrate programs of each and tackle issues that can help us in our daily communications. And, on December 20th we held a joint holiday party at More Than Just Ice Cream.

Respectfully submitted,

Diane A. Menio, Executive Director