2-1-1 and Aging & Disability Resource Centers: Challenges and Opportunities

ADRC Conference Call
September 9, 2004
What is 211?

- Designated by FCC July, 2000 – three digit phone number to access health & human service information and referral services.

- 911 – emergency police and fire
- 411 – directory assistance
- 211 – community I&R
- 311 – non-emergency police
- 511 – road conditions
- 711 – hearing/speech impaired
Consumer Benefits of 211

- A simple and easy-to-remember number to call when people need help or access to human services
- Ensures that callers get directed immediately to the appropriate service or specialty I&R
- Reduces inappropriate and multiple calls for consumers
- 24-hour service gets people the help they need when they need it
2-1-1 ACCESS SYSTEMS

2-1-1 Call Center
May be operated by any of the I&Rs in the system

2-1-1 I&R Specialist
- Identifies Problem
- Decides Most Appropriate I&R/A Service to:
  - Assess Needs
  - Identify Resources
  - Educate
- Empower
- Follow-Up
- Advocate
- Proceeds with Assessing Needs, etc...

"OR"
Routes to other I&Rs in the system

Special Population I&R/As such as
- Child Care Resource & Referral
- Aging I&R/A

Generic I&Rs
- General Purpose I&Rs
  Serve Broad Populations on Broad Range of Issues

Special Purpose I&R/As such as
- Child Abuse
- Substance Abuse
- Mental Health
- Crisis

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Current Status

- 2-1-1 serves approximately 94 million Americans - over 33% of the US population
- 137 active 2-1-1 call centers in 26
- Statewide: CT, HI, MN, IA, ID
- Several states expected to launch in next 12-18 months
2-1-1 serves approximately 94 million - over 33% of the US population through 137 active 2-1-1 call centers in 26 states.
QUALITY ASSURANCE MECHANISMS

- **AIRS** Standards

- **AIRS** Certification of Personnel
  - Certified Information & Referral Specialist
  - Certified Resource Specialist

- **AIRS** Accreditation

- Other Quality Assurance Options
  - Call Monitoring
  - Customer Satisfaction Surveys
Public Sector Involvement
Why is it important?

Public Sector/ Government:
- has the authority to serve as an unbiased convener
- can ensure the involvement of the broadest range of I&R programs
- has expertise in systems design, statewide planning, and program financing
- can ensure the statewide availability of 211
- has the authority to establish standards to ensure quality of service
- can ensure that 211 belongs to the consumer
Some Key Activities

**Texas**

All 25 call centers are active with the last one operational the Summer 2004. 2-1-1 is a partnership of Texas Health and Human Services Commission and local I&R Agencies. State Legislative Initiative to integrate eligibility determination across all programs utilizing the 2-1-1 call centers as the access mechanism.

**Arizona**

February 2004, Governor created the Governor’s Council on 2-1-1 to develop a statewide 2-1-1 system for access for social service and homeland security. Council responsibilities: define policies, establish standards, identify resources, establish call centers. Responses to RFP currently under review. Governor also created a 2-1-1 Community Advisory Committee made up of stakeholders and organizations that have been leaders on the issue, including United Way and the state's I&R providers to assist with implementation.
Some Key Activities

- **Minnesota**
  SUA took lead role to secured FFP funds for 2-1-1 financing.

- **Idaho**
  Department of Health and Welfare successfully provided statewide I&R services for over ten years. It collaborated with 2-1-1 Idaho to leverage existing resources in the establishment of 2-1-1 (a cost savings of 1.3 million). Used 15 AmeriCorps members and five AmeriCorps VISTA Volunteers to identify community resources and services.

- **New Hampshire**
  Passed legislation to establish a 2-1-1 Commission to oversee 2-1-1 system. Commission representatives include: statewide, local and specialized I&R providers, legislators, telephone company, consumer, health and human services and 911 representatives.
Some Key Activities

- **New Mexico**
  State Initiative establishing a 211 Council with State Council on Disabilities as lead agency.

- **Florida**
  State AHCA funding to test telephone-based eligibility screening & determination system for 3 healthcare programs.

- **Delaware**
  State 2-1-1 Task Force recommended that a 2-1-1 system be implemented by September 2003 as a partnership between Delaware Helpline and Contact Delaware with funding the State. Implementation delayed due to budget constraints.
Some Key Activities

- **California**
  State legislation introduced Spring, 2004, to authorize the PUC to designate a lead entity for 2-1-1 to strengthen the 2-1-1 system and provide a mechanism for allocation of Federal funds. Passed by the Assembly and is in Appropriations Committee of the Senate.

- **Illinois**
  General Assembly passed legislation (2003) authorizing use of 2-1-1 by up to six pilots I&R sites. Requires Governor to establish an Illinois 2-1-1 Collaboration Board comprised of state government agencies to identify process to select and oversee the pilot sites. Does not appropriate dollars for 2-1-1; requires local I&R agencies to fund 2-1-1 with local and private dollars.
Some Key Activities

❖ **Oklahoma**

2-1-1 Legislation (June 3, 2004) designated the Oklahoma 2-1-1 Advisory Collaborative as the official state coordinating and certifying entity for all 2-1-1 Call Centers.

❖ OK Telecommunications Services Permanent Rules (2003) established 2-1-1 regulations:
  – describes and defines 2-1-1 services,
  – requires compliance with all National Standards for 2-1-1 Call Centers,
  – requires all telephone companies in Oklahoma have to provide 2-1-1 access where the service is available.
Some Key Activities

**Washington**

State legislation to develop a comprehensive 2-1-1 statewide system:

- Creates 2-1-1 as the official state number for people to call for I&R and after a natural or non-natural disaster
- Directs WIN 211 to design, implement, and support statewide 211 system
- Creates a 211 account in the state budget to receive future state or federal funding
- Directs state agencies and departments to consult with WIN 211 about using the 211 system before creating any new public information lines or hotlines
Federal Legislative Efforts

- **Bio-Terrorism Legislation** - June, 2002
  - State plans allowing support of 2-1-1

- **Calling for 2-1-1 Act** - September 17, 2003
  - Dole (R-NC), Clinton (D-NY), Burr (R-NC), Eshoo (D-CA)
  - $200 million to states for statewide development of 2-1-1 systems

- **Breaking the Barriers Grants** - September 29, 2003
  - UWA to United Ways
  - $540,000 total: $25,000-$100,00 per grantee
  - CA, IL, FL, NC, NY, IN, DC, OR & WA

- **$10 million Earmark** (UWA) - March, 2004
2-1-1

Some Concerns

– Collaboration across all I&Rs serving all populations
– Building upon while maintaining the integrity of existing I&R programs
– Consistency in the quality of service
– Stable financial base
– Ensure public purpose intent of 211
Aging-Specific Concerns

– 2-1-1s Need for Funding
– View: Aging I&A as Duplicative of 2-1-1
– Need for Cost Effective Systems
– Certification of I&R/A Personnel of ADRC
Options for ADRCs

Define what a 2-1-1 is and is not

Hint: Call Centers are a corporate model designed to handle customer service/complaints

Define what ADRC’s I&R/A is

- Multiple functions of the I&R/A service—specify those unique to serving older persons, persons with disabilities, and caregivers
- Its role as an integral component of a larger service delivery system and specify the programs it operates
- Expertise of personnel in aging, disabilities, and caregiver issues
- Unique partnerships of the ADRC with disability groups, Medicaid, and others
Key Functions of I&R/A

- Information
- Assessment of Need(s)
- Referral—Link to Services
- Decision Support
- Empowerment
- Follow-up
- Case Advocacy
- Data Collection for Service Planning
Aging and Disability Resource Center

Functions

– Awareness and Information
  • Public Education on Long Term Support Options

– Assistance
  • Long Term Support Options Counseling and Planning
  • Benefits Counseling
  • Employment Options Counseling
  • Crisis Intervention
Aging and Disability Resource Center

Functions

– Access

• Eligibility Screening
• Assistance in accessing private pay services
• Comprehensive Assessment
• Programmatic Eligibility Determination
• Medicaid Financial Eligibility Determination
• One-Stop Access to all public programs LTC support services (Medicaid, OAA, other publicly funded services)
Expanding Role of Aging I&R/A

- Intake, Screening, and Assessment
- Family Caregiver Support Program
- State Health Insurance and Assistance (SHIP)
- Medicare Fraud and Abuse
- State Pharmaceutical Assistance Programs
- Entry Point for HCBS
- Link to Case Management
- APS
Some Key Initiatives in Aging I&A

- Expanded databases for additional populations, referral protocols, staff training
  - persons with physical disabilities, MR/DD, mental illness
- Statewide databases
- Certification of I&R/A personnel
- New database resources
  - housing units, public housing authorities, health/fitness/disease prevention
- Web-based resources and tools
  - self assessments, guides, etc.
- Development of Personal Assistance Workers (registries)
- Consumer Direction
Options for ADRCs

- Local 2-1-1 planning and implementation groups
- Working relationships with local 2-1-1 provider
- Define how the 2-1-1 would best serve the needs of your ADRC
- Develop an MOU
MOU Negotiations

- Definitions: 2-1-1 and ADRC
- Call handling and transfers
  - Call handling at 2-1-1 call center;
  - Transfers: give ADRC number; call forwarding; call menu
- Special populations
- Databases: shared, statewide, access for aging to additional resources
- Database updating and data integrity
MOU Negotiations

- Marketing and outreach
  - Both; joint; separate
- 24/7 service coverage
  - Hours; database access; procedures
- Cross-training of staff
- Intake and client data issues
  - Differences in scope and function
- Values
2-1-1 Resources

Sample 2-1-1 MOUs

- [http://www.nasua.org/informationandreferral/211.htm](http://www.nasua.org/informationandreferral/211.htm)

www.211.org

- State contact information
- Status of developments across the country
- Materials

Alliance of Information and Referral Systems (AIRS)

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Nat’l Aging I&R/A Support Center/ NASUA

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- [www.nasua.org/informationandreferral](http://www.nasua.org/informationandreferral)