Baseline Measures of a Systems Change Initiative for the Aging & Disabilities Communities: *Measuring the Unmeasurable*

American Public Health Association
Annual Meeting

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Systems Transformation in SC

- **PHASE 1: 2001 – 2004**
  - **Real Choice Grant**
  - **Nursing Home Transition Grant**
  - **Promoting Consumer Direction in Aging Services Grant**
- **PHASE 2: 2003 – 2006**
  - **SC Access Plus Grant – ADRC**
  - **Medicaid Infrastructure Grant**
- **PHASE 3: 2005 – CURRENT**
  - **Family-to-Family Health Information & Education Grant**
  - **Systems Transformation Grant**

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Systems Transformation Grant

- **Goal 1: Improved Access to Long-Term Support Services**
  - **Develop additional linkages with other agencies**
    - **Design a short term case management component for the current ADRC**
    - **Expand target group and target areas**
    - **Apply lessons learned from the implementation of the current ADRC**
- **Goal 2: Transformation of IT Systems**
  - **Develop technology to support consumer-oriented transportation access**
  - **Install mobile data terminals and GPS in area vehicles participating in the project**
  - **Expand SC Access web site to cover information on transportation and to offer on-line application forms**

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Systems Transformation Grant

- **Goal 3: Creation of a System That More Effectively Manages the Funding for Long-Term Supports That Promote Community Living Options**
  - **Target persons at high risk of institutionalization and successive hospitalizations for short-term, interim case management services**
  - **Develop methodology for prioritizing the wait list for Medicaid HCBS to promote more efficient utilization of Medicaid funding**
  - **Expand the ADRC to include a one-stop center for transportation information, reservations, assessment of eligibility, and linkage to travel options within the region**

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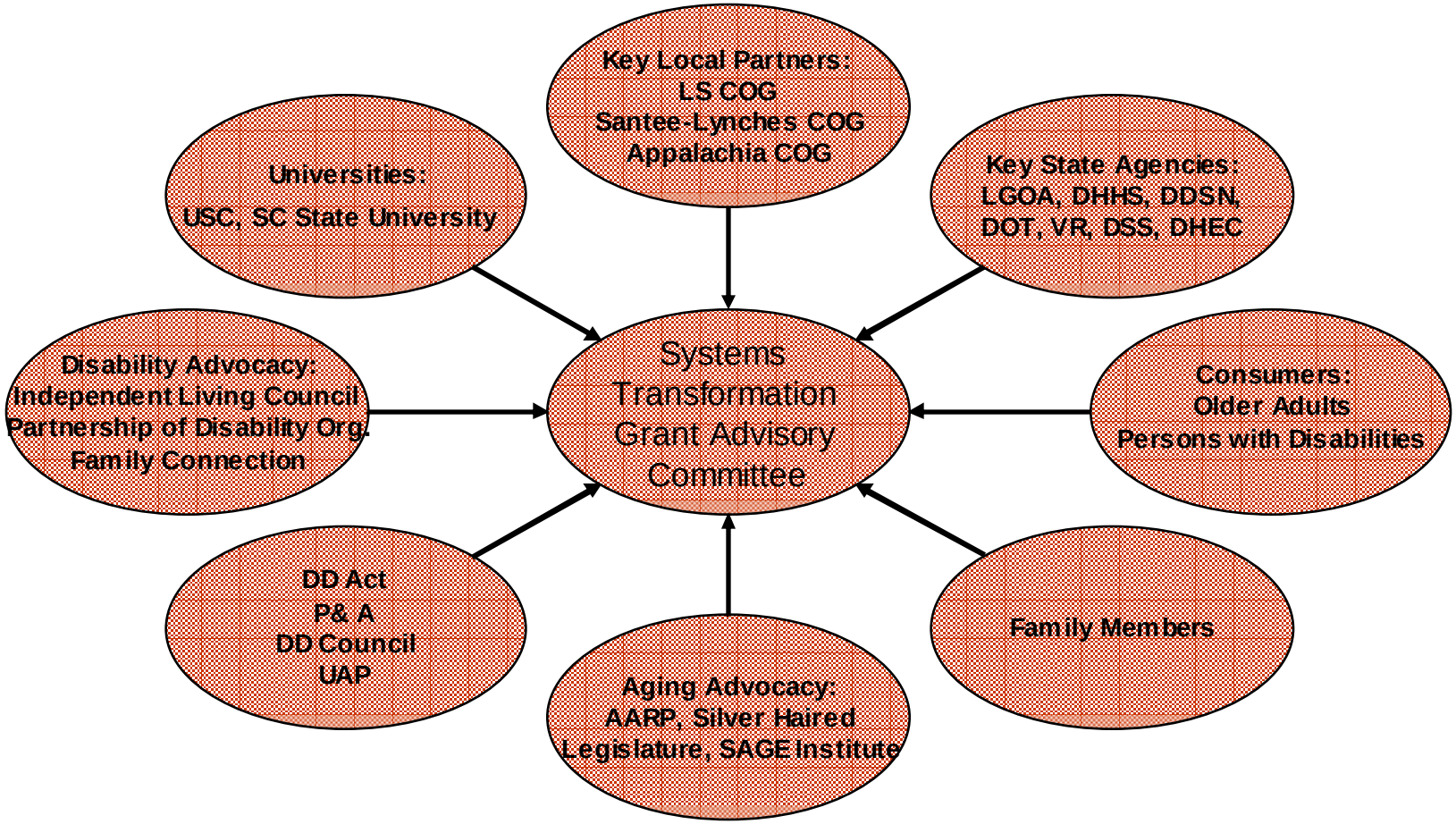
The STG Evaluation

Key Stakeholders



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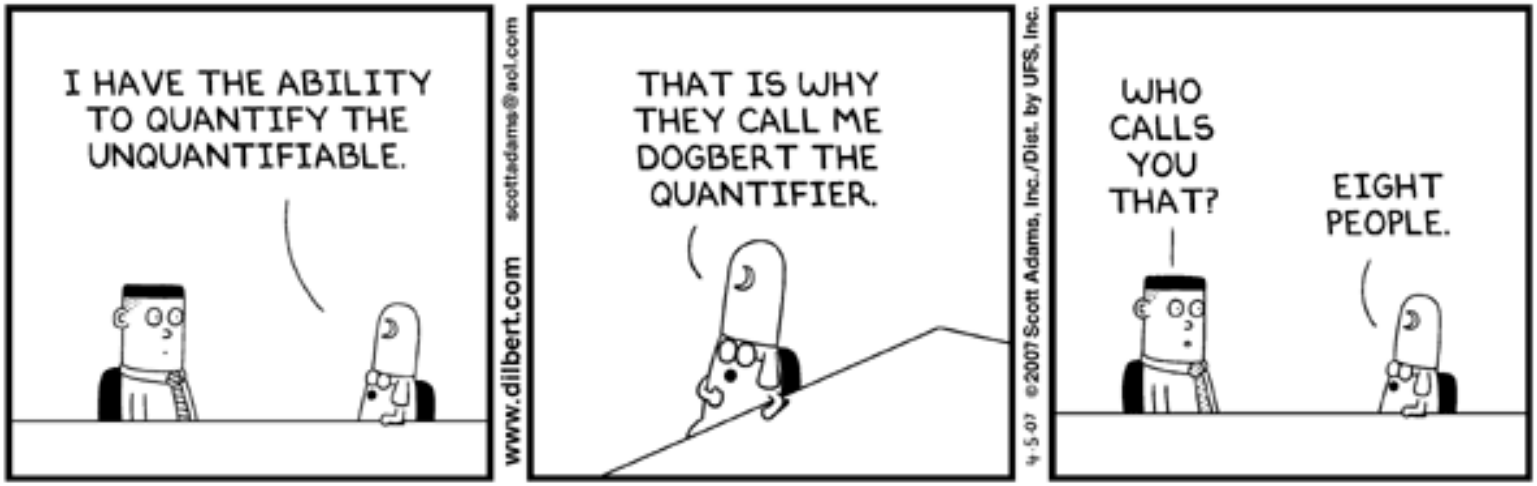
Measuring the Unmeasurable



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Measuring the Unmeasurable

- Collaborative process between stakeholders
  - Partnership ties
  - Breadth / depth of commitment
- Systems change process
  - Where are we – where do we want to be
    - What are the outcomes?
- Consumers' sense of ease w/the system
  - Satisfaction
    - Access
    - Visibility
    - Trust

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Evaluating the Collaborative Process

- The Collaborative Process Checklist
  - Quantitative
  - On-line
  - Every 6 months
- Partnership Mapping
  - Quantitative / qualitative
  - In person, paper-and-pencil
  - Annually

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Evaluating the Collaborative Process

- Stakeholder interviews
  - Qualitative
  - In-depth, audio-taped
  - Annually
- Consumer focus groups
  - Qualitative
  - Facilitated discussion, audio-taped
  - Pre-post

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Evaluating the Collaborative Process

Please rate the efforts made by *OTHER PARTNER ORGANIZATIONS* towards effective collaboration in making systems transformation happen:	**Strongly Disagree**	**Disagree**	**Agree**	**Strongly Agree**
In their collaborative efforts to implement the goals and objectives of the Systems Transformation grant, OTHER PARTNERING ORGANIZATIONS CURRENTLY…				
1. communicate openly and clearly with each other	1	2	3	4
2. understand each other's organizations, including the people, organizational cultures, and organizational values	1	2	3	4
3. believe in the value of stronger collaboration between all partnering organizations	1	2	3	4
4. believe that the other partner organizations are contributing equally to the collaboration	1	2	3	4
5. consider the current activities of State Office on Aging towards implementation as effective	1	2	3	4
6. understand the organizational barriers that may impede stronger collaboration between partner organizations	1	2	3	4
7. have and make available the necessary resources to bring about systems transformation	1	2	3	4
8. appreciate the extent of involvement of the other organizations	1	2	3	4
9. work jointly and collaboratively towards bringing about systems transformation	1	2	3	4
10. believe that the benefits of working towards systems transformation outweigh the drawbacks	1	2	3	4

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Evaluating the Collaborative Process

PARTNERSHIP MAP – Please complete this Table for established and wish partners, using the scales provided to guide your rating.

PARTNER NAME (fill in)	TYPE (Please enter a sentence or two)	VALUE (indicate 1, 2, 3, or 4)	STRENGTH (indicate 0, 1, 2, 3, or 4)		EXTENT (indicate 1, 2, or 3)	SATISFACTION (indicate 1, 2, 3, or 4)
			ACTUAL	DESIRED		
Established Partners						
Wish Partners						

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STG Interview Guide
Initial Interview

Opening	1.	Please tell me your name and your title.
Introduction	2.	In your own words, please briefly describe the Systems Transformation project.
Transition	3.	In your mind, what is the STG trying to accomplish?
Key	4.	How do you see your role in this project?
	5.	Please tell me what you think is going well so far?
	6.	What do you think is not going well? Why?
Key	7.	Please tell me how, in your opinion, the Lieutenant Governor's Office and you (your organization) can work together.
Probe		▪ What are the benefits of a collaboration between you (your organization) and the LGOA? ▪ ...for your organization?
Key	8.	What are some of the things that stand in the way of you (your organization) and the LGOA working together?
Probe		▪ What should we do about them?
Key	9.	What do you think needs to happen short-term?
	10.	How about long-term?
Ending	11.	Of all the things involved in making systems change happen, which do you think is most important?
Ending	12.	As we move ahead with the project, what is your advice?

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Collaboration: Preliminary Results

- 15 stakeholder interviews: Jul. 1 – Sept. 30, 2006
  - STG Advisory committee and five workgroups
    - Thoughts / opinions about nature of STG
    - Role in the project
    - Barriers to the project / ways to overcome
    - Short-term / long-term must-do activities
  - Audio-taped / augmented with field notes
  - On average 75 minutes

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Collaboration: Preliminary Results

- *Theme 1:* Everybody gets the vision
  - More active exchange between agencies
  - Consumer choice
    - Disagreement about what a transformed system is
- *Theme 2:* If we want others to get the vision, we need to tell them
- Theme 3: Legislators need to get the vision
  - $$$ appropriated to the effort
  - $S = LB^2$
- *Theme 4:* Things that could derail the vision
- *Theme 5:* Things we need to do … and keep doing
  - Stop talking and start doing

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Collaboration: Preliminary Results

- Collaborative Checklist – three administrations
  - Baseline – April 2006; 13 respondents
  - Follow-Up 1 – September 2006; 9 respondents
  - Follow-Up 2 – March 2007; 7 respondents
- Advisory Committee – 35 invited respondents
  - Baseline–13; Follow-Up 1–9; Follow-Up 2–7
- Workgroups – 65 invited respondents
  - Baseline–37; Follow-Up 1–26; Follow-Up 2–16
    - Slight change in Mean Collaborative Score
    - Lack of participation reflects less than positive perceptions regarding collaborative effort

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Collaboration: Preliminary Results

Group	Mean Score	Advisory Committee
Baseline	*2.0*	**Example:** **"Advisory committee members contribute equally to the collaborative effort"**
Follow-Up 1	*2.1*	
Follow-Up 2	*2.1*	

1 = Strongly Disagree; 2 = Disagree; 3 = Agree; 4 = Strongly Agree

Baseline to Follow-Up 1	Follow-Up 1 to 2	Baseline to Follow-Up 2
p = .6	p = .6	p = .3

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Collaboration: Preliminary Results

Group	Mean Score	Workgroups
Baseline	*2.0*	**Example:** **"Workgroup members have the necessary resources to bring about systems transformation"**
Follow-Up 1	*1.9*	
Follow-Up 2	*2.1*	

1 = Strongly Disagree; 2 = Disagree; 3 = Agree; 4 = Strongly Agree

Baseline to Follow-Up 1	Follow-Up 1 to 2	Baseline to Follow-Up 2
p = .3	p = .1	p = .4

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Evaluating Systems Change

- Systems Outcomes Checklist
  - Quantitative
  - On-line
  - Pre-post
- Services Integration Mapping
  - Qualitative
  - In-depth, in-person, paper-and-pencil
    - Organizational charting
  - Pre-post

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Evaluating Systems Change

Improved Access to Long-Term Care Support Services					
Please answer the following statements based on whether, and to what degree, you believe each activity is **presently** occurring …	1 Not Presently	2 Rarely	3 Sometimes	4 Regularly	9 Don't Know
1. Consumers know about available resources and service options for …					
a. Long-term care supports	1	2	3	4	9
b. Developmental / physical disabilities supports	1	2	3	4	9
c. Transportation and mobility supports	1	2	3	4	9
2. Consumers have access to user-friendly information about options for…					
a. Long-term care resources and services	1	2	3	4	9
b. Developmental / physical disabilities resources and services	1	2	3	4	9
c. Transportation and mobility resources and services	1	2	3	4	9
d. Personal care workers through "Learn About" in SC ACCESS	1	2	3	4	9
e. Other "Learn About" topics in SC ACCESS	1	2	3	4	9
3. Consumers experience difficulty in applying for Medicaid and other services as related to …					
a. Long-term care resources and services	1	2	3	4	9
b. Developmental / physical disabilities resources and services	1	2	3	4	9
c. Transportation and mobility resources and services	1	2	3	4	9
4. Consumers use the on-line Medicaid Eligibility Application (Medicaid E-Form)	1	2	3	4	9
5. Consumers at risk for institutional placement are able to remain at home	1	2	3	4	9

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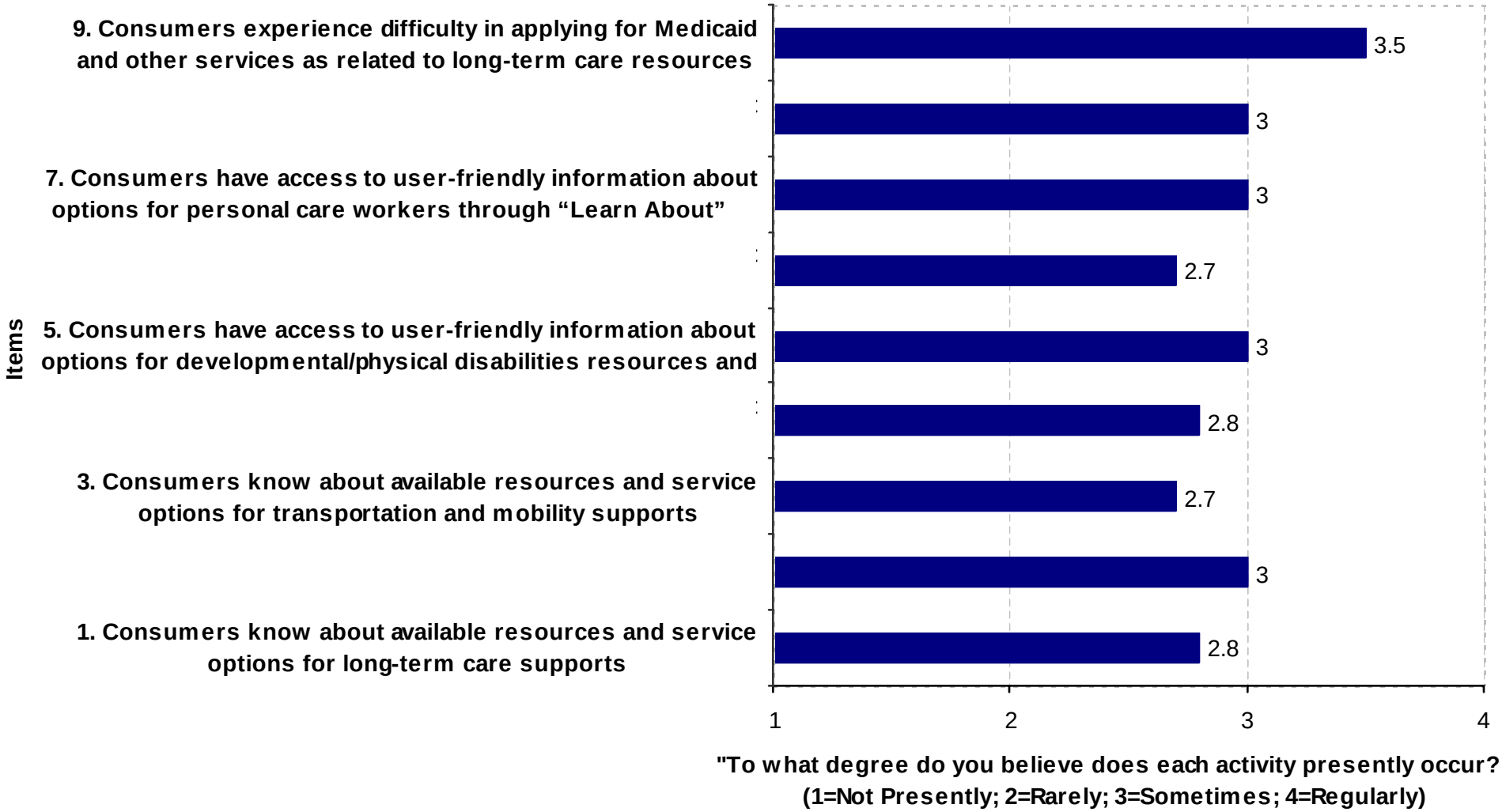
Systems Change: Preliminary Results

Systems Transformation Grant: Systems Outcomes Checklist, Baseline (September 2006)
Items 1 - 9; Improved Access to Long-Term Care Services



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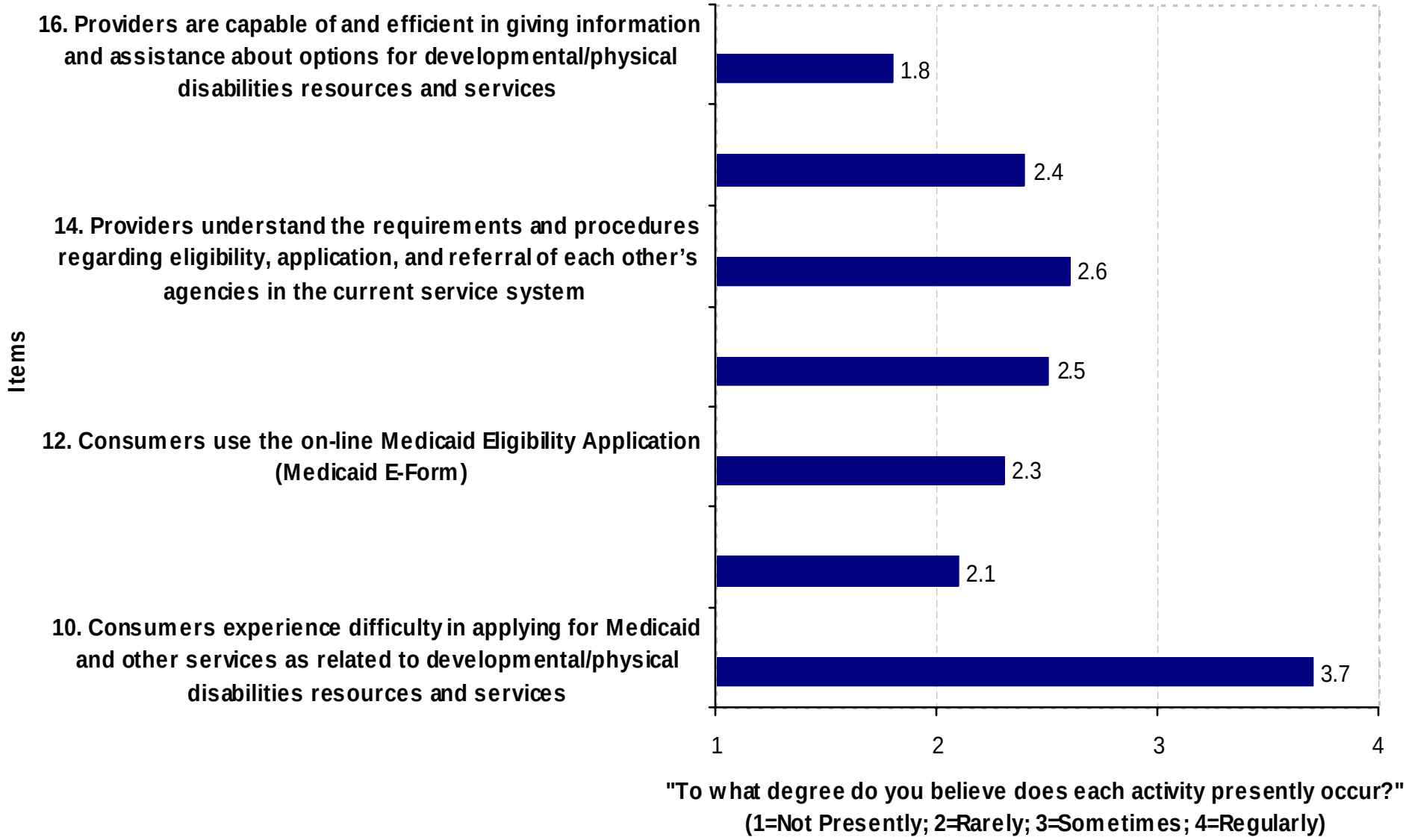
Systems Transformation Grant: Systems Outcomes Checklist, Baseline (September 2006)
Items 14 - 16; Improved Access to Long-Term Care Services, cont.



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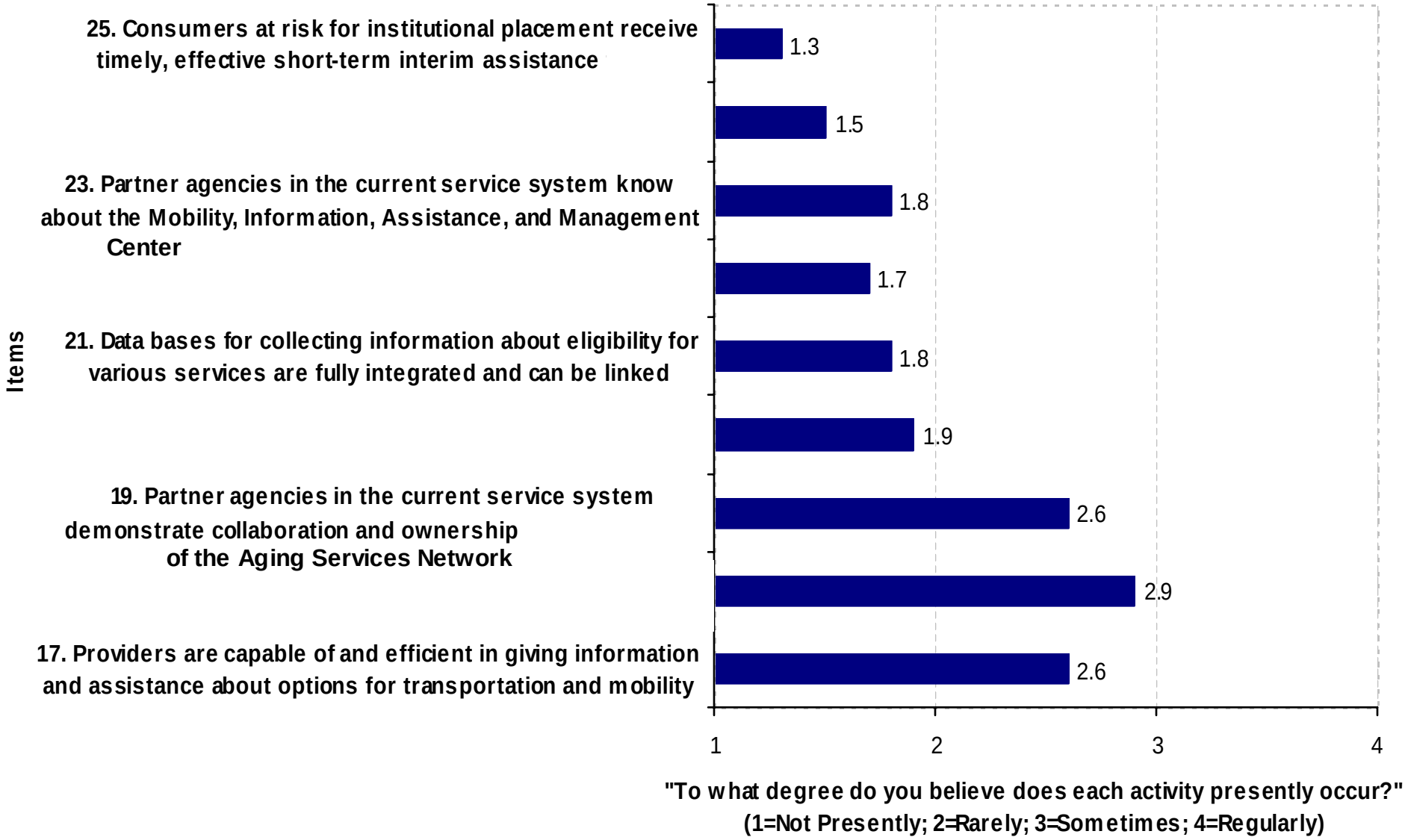
Systems Transformation Grant: Systems Outcomes Checklist, Baseline (September 2006)
Items 18 - 25; Improved Access to Long-Term Care Services



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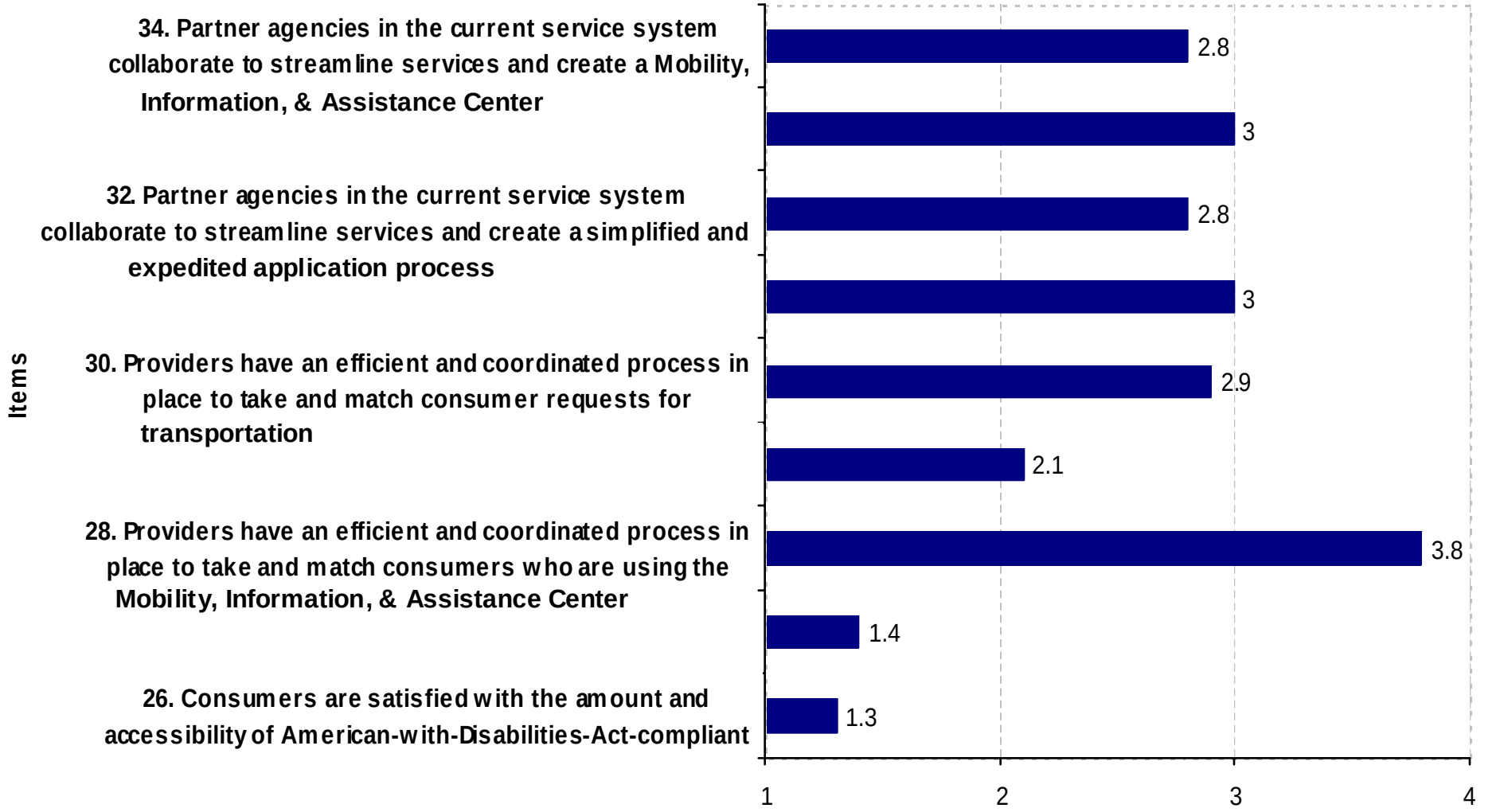
Systems Transformation Grant: Systems Outcomes Checklist, Baseline (September 2006)
Items 26 - 34, Transformation of Information Technology



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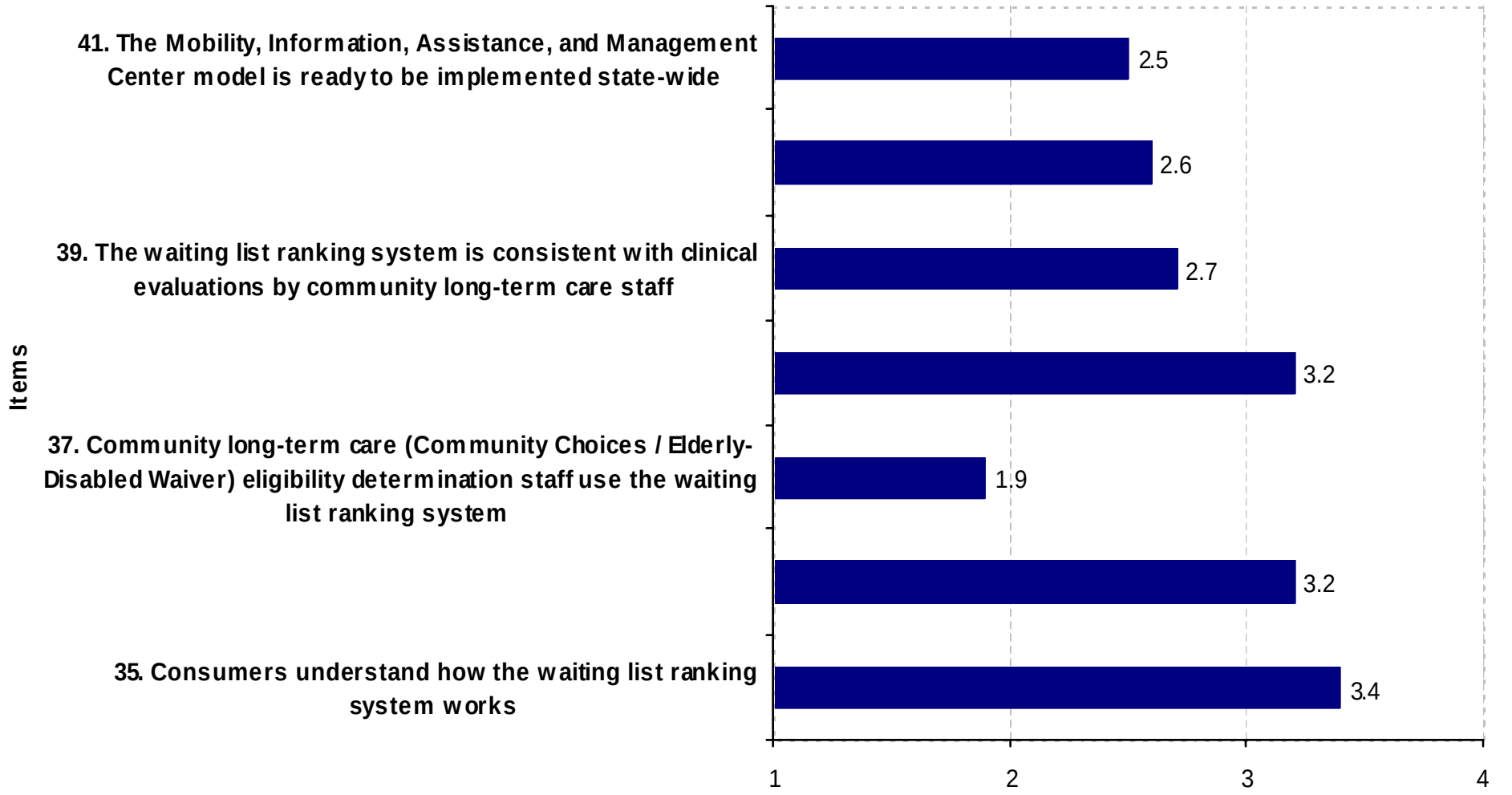
Systems Transformation Grant: Systems Outcomes Checklist, Baseline (September 2006)
Items 35 - 41; Creation of a System that More Efficiently Manages LTC Funding



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Evaluating Consumers' Opinions

- Consumer Satisfaction Survey
  - Quantitative, mail-out
  - Monthly
    - Simple random sample of new ADRC users (N=30)
      - In all five ADRC [LTC] regions – Start date: May 2007
- Consumer focus groups
  - Qualitative, facilitated discussion, audio-taped
    - 1 group in each of the 5 ADRC [LTC] regions
    - Begun in April 2007
  - Pre-post

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Consumer Satisfaction Survey

Consumer Satisfaction Survey

We want to find out how satisfied you are with the services we provide to you through our Aging and Disability Resource Center. Just look over this survey and circle the answers that best fit your opinion about the Aging and Disabilities Resource Center (ADRC). Please send the survey back to us in the enclosed, pre-paid envelope. Thank you.

Please answer Questions 1–4 IF you contacted the ADRC by phone.				
	Agree Strongly	Agree Somewhat	Disagree Somewhat	Disagree Strongly
1. I was able to talk to a "real" person when I called	1	2	3	4
2. If I had to leave a message, someone called me back within 24 hrs	1	2	3	4
3. The person answering the phone was friendly and courteous	1	2	3	4
4. If the first counselor I was connected to could not help me, I was referred to someone who could right away	1	2	3	4

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THANK YOU – Any questions?

For more info please contact …

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