

**Assessment Forum:
California Olmstead Advisory Committee
November 21, 2005
1:00 pm-4:00 pm
Secretary of State, 1500 11th Street (between O & P),
1st Floor Multipurpose Room**

BACKGROUND: Assessment Forum

In California, an assortment of programs use assessments to perform a variety of functions, including functional eligibility determinations, financial determinations, individual preferences, and care plan development. Assessments vary with respect to the functions performed, the population(s) assessed, the level of automation, the extent of integration with other systems, the administration of the assessments, and the questions included within the assessments.

The current array of categorical long term care programs offered to seniors and persons with disabilities who have long term care needs in California are provided by a variety of local, regional and statewide social services agencies with multiple funding sources. Each home and community-based program is designed with its own unique eligibility criteria, assessment tool and protocol. It is not uncommon for an individual needing assistance with activities of daily living to be assessed by three or four separate organizations in order to patch together various services and supports that enable him/her to remain in the community instead of being admitted to a nursing facility. The Olmstead Advisory Committee is interested in addressing this issue, and exploring policies that remedy the fragmented assessment system.

The purpose of the Assessment Forum is to review and discuss existing assessment practices across California, as well as the successes and challenges of each approach. We will highlight various types of assessments, including those centered on transitioning people out of nursing homes, diverting people from institutionalization, and assessing caregiver needs. Additionally, ideas for consolidating and/or streamlining various assessment tools will be explored. The findings from the Forum will be used by the workgroup in formulating recommendations to California Health and Human Services Agency Secretary Kim Belshé.

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I. Opening Overview- What are assessments and why are they important for Olmstead purposes? (1:00 pm-1:30 pm)

- Opening Remarks and Agenda Overview by Tony Sauer, Chair of the Olmstead Advisory Committee Assessment Workgroup and Executive Director, Nevada-Sierra Regional Public Authority
- Ben Harville, California Department of Rehabilitation, Independent Living Section
- Joan Lee, Gray Panthers of Sacramento and Member, Olmstead Advisory Committee

ii. Panel Discussion: Overview of Assessment Tools (1:30 pm-2:30pm)

Nursing Home Transition Tools:

- Olmstead Community Living Transition Checklist: Michael Alward, Health for All (to be confirmed)
- Community Resources for Independence (CRI): Nancy Hall of CRI
- Westside Center for Independent Living (WCIL): Thomas Olzak, WCIL

Preference Assessments:

- Consumer Preference Assessment of the Money Follows the Person project: Paula Acosta, California Department of Health Services

Caregiver Assessments:

- Uniform Assessment by California's Caregiver Resource Centers: Kathleen Kelly, Family Caregiver Alliance

Uniform Assessments:

- San Mateo County and the MDS-HC: Heather Ledesma, San Mateo County (to be confirmed)

III. Forum (2:30pm-3:15pm)

Participants review individual assessment tools

IV. Wrap up (3:15pm-3:45pm)

Panel discussion on findings, conclusions and next steps

Moderated by Tony Sauer

- Liz Rottger, Olmstead Advisory Committee
- Paula Acosta, California Department of Health Services
- Kathleen Kelly, Family Caregiver Alliance