

NEW DIRECTOR TRAINING

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ACL Overview & OHIC Expectations

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Brain Wrap

For each session, use sticky notes and attach to the paper hanging on the wall responses to questions:

- What insights did you gain?
- What will you do with this knowledge?
- How can we be helpful?

Administration for Community Living (ACL)

OLDER ADULTS AND PEOPLE WITH DISABILITIES HAVE THE SAME OPPORTUNITIES AS EVERYONE ELSE TO:

-  CHOOSE WHERE TO LIVE
-  EARN A LIVING
-  PARTICIPATE IN SOCIETY
-  MAKE DECISIONS ABOUT THEIR LIVES



HOW DOES ACL SUPPORT COMMUNITY LIVING?



FUNDS SERVICES THAT HELP PEOPLE LIVE INDEPENDENTLY



INVESTS IN RESEARCH, INNOVATION, TRAINING, AND EDUCATION



ADVOCATES FOR PEOPLE WITH DISABILITIES AND OLDER ADULTS

Administration for Community Living

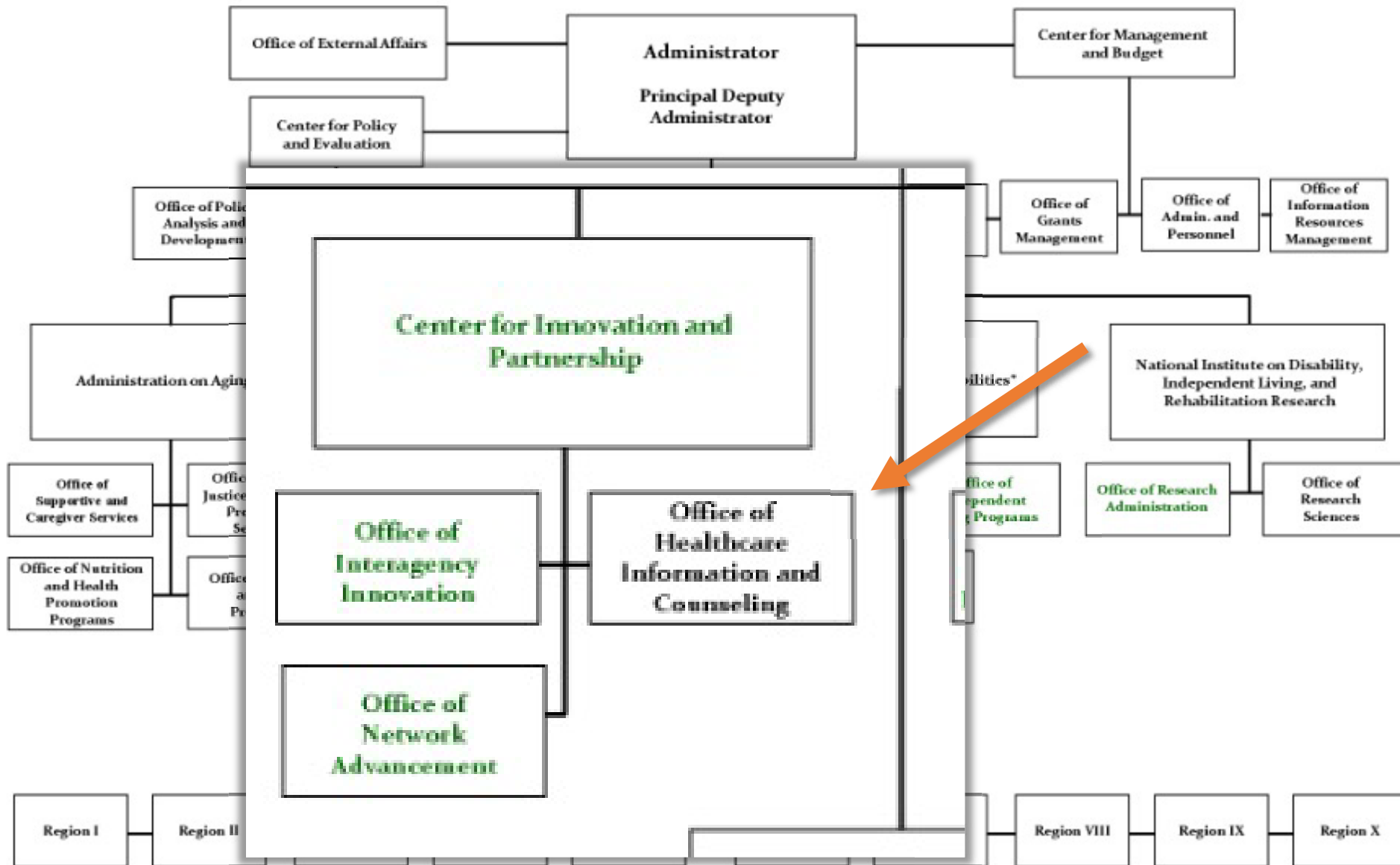
Mission: Maximize the independence, well-being, and health of older adults, people with disabilities across the lifespan, and their families and caregivers.

Vision: For all people, regardless of age and disability, to live with dignity, make their own choices, and participate fully in society.

Learn more at:
www.acl.gov



ADMINISTRATION FOR COMMUNITY LIVING ORGANIZATIONAL CHART



* The Administration on Aging is headed by the Assistant Secretary for Aging, who is also the ACL Administrator. The Deputy Assistant Secretary for Aging supports the Assistant Secretary in overseeing the Administration on Aging. The Deputy Assistant Secretary for Aging also serves as the Director of the Office of Long-Term Care Ombudsman Programs consistent with Section 201 of the Older Americans Act.

Office of Healthcare Information and Counseling

- The Office of Healthcare Information and Counseling manages programs and activities designed to empower Medicare beneficiaries, their families, and caregivers to make informed healthcare decisions. Programs include:
 - State Health Insurance Assistance Programs (SHIP)
 - Senior Medicare Patrol (SMP)
 - Medicare Improvements for Patients and Providers Act Program (MIPPA)
 - Financial Alignment Initiative (FAI) Ombudsman Technical Assistance

OHIC Programs 101

	SMP	SHIP	MIPPA
Grants	Competitive Grants awarded every five years.	Non-Competitive grants that go to either the Aging (2/3 of grantees) or Insurance Depts (1/3 of grantees)	Funds for AAAs, ADRCs, and SHIPs within each state who chose to submit a state plan
Current Project Period	6/1/2023- 5/31/2028	4/1/2020-3/31/2025	9/1/2022-8/31/2024
Purpose	To educate beneficiaries on Medicare fraud, errors, and abuse	To educate and assist beneficiaries on their Medicare options, enrolling, and accessing benefits.	To assist beneficiaries w/ limited income and assets in enrolling in programs to help them pay for Medicare
Data System	SIRS	STARS	STARS

OHIC Program Funding

Program	FY 2021	FY 2022	FY 2023
SHIP	\$52.1M	\$53.1M	\$55.242M
SMP	\$22M	\$30M	\$35M
MIPPA	\$50M	\$50M	\$50M
<i>SHIP</i>	<i>\$15M</i>	<i>\$15M</i>	<i>\$15M</i>
<i>AAA</i>	<i>\$15M</i>	<i>\$15M</i>	<i>\$15M</i>
<i>ADRC</i>	<i>\$5M</i>	<i>\$5M</i>	<i>\$5M</i>
<i>NCOBE</i>	<i>\$15M</i>	<i>\$15M</i>	<i>\$15M</i>

ACL Team Roles

- **OHIC Program Managers**
 - Set national direction for each program
 - Overall management/administration of the program
 - Oversight and management of Center grants
- **OHIC Project Officer (PO)**
 - Day-to-day Federal responsibilities for managing grant
 - Provides technical assistance/guidance to help you meet grant requirements
 - Your primary point of contact at ACL
- **Grant Management Specialist (GMS)**
 - Responsible for business, fiscal, and non-programmatic aspects of your grant award
 - May contact you with budget questions or requests

Grantee Roles

- **Authorized Organizational Representative (AOR)**
 - Signs grant application
 - Authorized to act on agency's behalf
- **Principle Investigator/Project Director (PI/PD)**
 - Responsible for programmatic/technical operations
 - Day-to-day management of the program
- **Fiscal Staff**
 - Day-to-day management of grant budget
 - Completion of federal financial forms (i.e. SF 425)

Important Partners

ACL/OHIC Grantees:

- North East Iowa Area Agency on Aging (NEI3A)
 - SMP Resource Center
 - SHIP Technical Assistance Center
- National Council on Aging (NCOA)
 - National Center for Benefits Outreach and Enrollment

Partners with NCOA &/or NEI3A:

- USAging
- ADvancing States
- Center for Medicare Advocacy
- Medicare Rights Center

ACL/OHIC Memorandums of Understanding

These MOUs outline partnership parameters, responsibilities, and collaboration opportunities.

CMS

- Agreement include CMS **Office of Communications (OC)** and the **Office of Program Operations & Local Engagement (OPOLE)**
- Includes:
 - National Training Program, 1-800-Medicare, Medicare Plan Finder, Unique ID Management, Regional Offices, Casework/CTM

SSA

- Agreement with SSA broadly on programs and activities directed for older adults and persons with disabilities
- Establishes:
 - Executive liaisons
 - Agreement to meet frequently, share updates, collaborate on appropriate projects, etc.

OHIC Priorities & Major Activities: Benefits Access

OHIC programs provide high amounts of enrollment assistance:

- **84% of the one-on-one assistance provided by SHIPs** included enrollment assistance in some form (4/1/2022 – 3/31/2023)
- **MIPPA state grantees held over 72,000 contacts** where applications for LIS and/or MSP were submitted (9/1/2022 – 8/31/2023)
- **BECs assisted over 87,000 individuals** with submitting over 140,000 applications for benefits worth and estimated \$312 million (3/1/23 – 8/31/2023)

Programs also focus on reaching those with **limited income**:

- **100% of MIPPA** contacts (1,654,523 in 2022) are with individuals with income below 150% FPL
- In 2020 **35% of SHIP** one-on-one contacts were with individuals with incomes below 150% FPL
- **55% of BEC** contacts had incomes below \$15,000/year (3/1/23 – 8/31/2023)

Benefits access is central to much of the work conducted by
OHIC grantees.

OHIC Priorities & Major Activities: Approaching Retirement

Approaching Retirement Project

- Part of broader Customer Experience work of current Administration
- Developed using Human-Centered Design research
- Identified lack of support and guidance
 - We leave people on their own to make sense of an opaque and fragmented retirement landscape often during high-stress transitions.



“You can’t figure out who to trust, it’s too much. I can’t imagine people who didn’t have professional skills, jobs, education. You’ve got to do something to alleviate that whole system. ...How do you find out what’s right for you and who to trust?”

Josephina | 65 | Construction Worker | Single

Retirement Catalyst: Retired early due to an accident that disabled her Dalton, Missouri



OHIC Priorities & Major Activities: Approaching Retirement

Project Audience Focus:

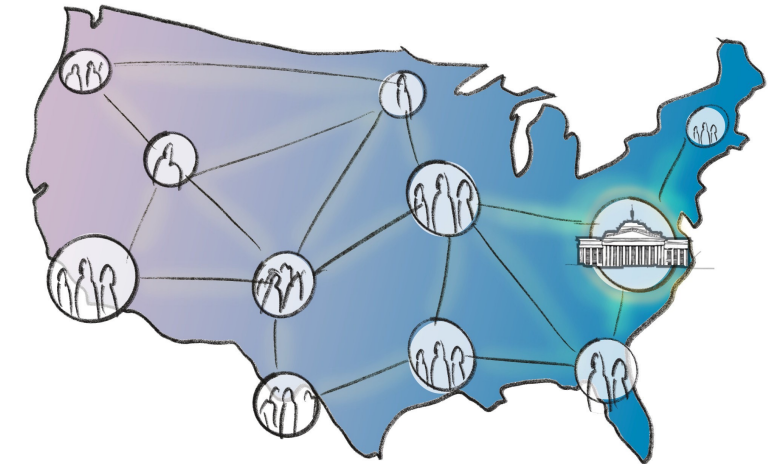
- Marginalized communities
- Those age 60+
- Those with moderate to low incomes:
 - 350% FPL (About \$50,000 for single and \$70,000/year for two people)

Identified two interventions:

- Federal Resource Decision Guides
- Supporting Older Adults Federal Forum (community of practice)



The Federal Guides are PDFs with consolidated federal resource information related to finances, food, healthcare and housing. This is intended to serve as the foundation in a system of solutions designed to connect older adults with decision-making support.



The Federal Forum will support staff from community-based organizations through virtual workshops covering a range of intersecting topics that matter to low-income older adults.

OHIC Priorities & Major Activities: Approaching Retirement

Federal Resources Decision Support Guides:

- Goal is to support those making retirement decisions with consolidated, authoritative, and user-friendly info on federal programs and benefits.
- Provide:
 - Benefits and service info
 - Rules and considerations
 - Info on accessing benefits and services
 - Where to find personalized assistance
- Currently found:
 - <https://www.performance.gov/cx/life-experiences/approaching-retirement/outputs/1/>



OHIC Priorities & Major Activities: Approaching Retirement

Partnering with NCOA to Test Guides

- Building on current efforts through the **National Center for Benefits Outreach and Enrollment (NCBOE)** grant to expand CBO reach and assistance available to beneficiaries
- NCOA recruited CBOs via a new grant opportunity for organizations wishing to become a Benefits Enrollment Center (BEC): [Grant Opportunity: Benefits Enrollment Center \(ncoa.org\)](https://www.ncoa.org/grant-opportunity/benefits-enrollment-center)
- Six Community-Based Organizations (CBOs) from across the country were selected:
 - Five Benefit Enrollment Centers (BECs)
 - One State Health Insurance Assistance Program (SHIP)



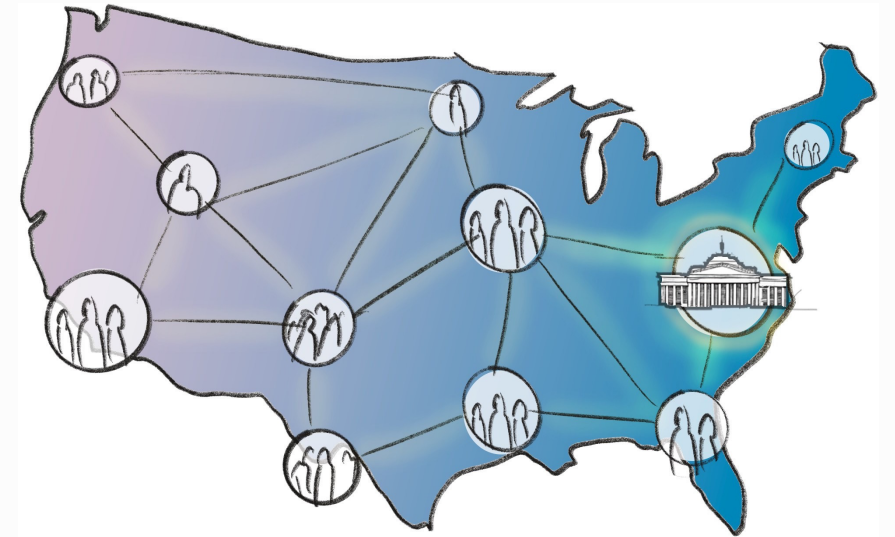
CBO Partners:

- Washington SHIP Program
- Elder Law of Michigan, Inc.
- Chicanos por la Causa, Inc. (AZ)
- Jin Huo Community Inc. (formerly Asian in Action Ohio)
- AgeOptions (IL)
- The Korean Community Service Center of Greater Washington (DMV)

OHIC Priorities & Major Activities: Approaching Retirement

The Federal Forum:

- Will meet virtually three times for 1-hour
- Broken into two parts:
 - Presentation by a federal benefit expert and
 - Include time for discussion and questions
- Designed to support staff from CBOs who serve older adults and are interested in building their knowledge of federal benefits and programs
- Facilitated jointly by federal benefit experts from project partner agencies



Overall Goal? Bring together federal agencies and CBOs that serve older adults to build knowledge related to federal programs and create an opportunity for peer-to-peer connection

OHIC Priorities & Major Activities: Data

Data Quality & Improvements

- Focus on improving data reporting and quality
- Working with contractor (CS Strategy) to support analysis of data challenges and issues

If it's not reported, it didn't happen.

If it's wrong, we can't count it.

If we don't communicate it, no one will know.

OHIC Priorities & Major Activities: DEIA

Diversity, Equity, Inclusion, and Accessibility

- Equity Assessments and Program Evaluations:
 - MIPPA moving into implementation phase
 - SMP started in 2023
 - SHIP set to start early 2024
- SMP DEIA Grants
 - Five 18-month awards focused on addressing DEIA in the state administration of the program
- Other Activities:
 - Revamping Funding Opportunity Expectations to be more inclusive and direct on expectations.
 - Trainings and other learning opportunities via Centers

Resource Center Trainings/Technical Assistance (T/TA)

- Virtual Training Opportunities
 - An Introduction to Microaggressions: What Are They, Why Do They Matter for Medicare Services, and How to Avoid and Respond to Them
 - Unconscious Bias and Microaggressions: Implications for Supporting Aging Adults and Individuals with Disabilities
 - Check Your Blind Spot Symposium



Resource Center T/TA continued

Conference Closing Plenary Half-day Session

- Bias to Belonging: Navigating Diversity, Equity, and Inclusion

Resources

- Newsletter articles
- Cultural Competency Resource Guide
- Materials in multiple languages in resource libraries
 - Grantee developed presentations, brochures
 - SSA translated materials
 - CMS translated materials

ACL Demographic Data Collection

- Current variables include age range, race, income, assets, English primary
- March 9, 2024 incorporating sexual orientation and gender identity (SOGI) to SIRS/STARS data system forms

Which of the following best represents how you think of yourself? [Select ONE]:

- Lesbian or gay
- Straight, that is, not gay or lesbian
- Bisexual
- I use a different term [free text]
- Don't know
- Prefer not to answer

What is your current gender [Select ONE]

- Female
- Male
- Transgender
- I use a different term: [free text]
- Don't know
- Prefer not to answer

Do you consider yourself to be transgender?

- Yes
- No
- Prefer not to answer

Improving Equity SOGI Data Collection

- STARS and SIRS Forms
 - Medicare Beneficiary Satisfaction Outreach Event Survey
 - Individual Interaction Forms
- Webinars: 12/21 and 2/6
 - Introduce SOGI questions
 - Share grantee and team member resources and support
- SAGE
 - SAGECare self-paced training: Supporting LGBTQ+ Older Adults and Asking Inclusive Intake Questions
 - Office Hours: 3/1, 3/22, and 4/5

Person Centered Thinking (PCT)



- 2023 Toolkit
 - Overview of PCT, actionable ideas and resources
 - Self-guided, self-reflection workbook with scenarios and videos
- 2024 Plans
 - Cultural Humility Literature Review and Infographic
 - Grantee workgroup
 - Equitable Reach Toolkit