WCCEAL
Wisconsin Coalition for Collaborative Excellence in Assisted Living
"Excellence in Wisconsin Assisted Living Through Internal Quality Improvement"

The **Johnson** Foundation **AT WINGSPREAD**
Conferences that Inspire Solutions

Meeting Recap

2022 ASSISTED LIVING QUALITY SUMMIT

Wingspread Retreat and Conference Center, Racine, WI
9:30 a.m., June 27 to 4:00 p.m., June 28, 2022

Hosted by the Wisconsin Coalition for Collaborative Excellence in Assisted Living ([WCCEAL](#))

The 2022 Assisted Living Quality Summit was convened to bring together national- and state-level experts around the shared vision of advancing the quality of assisted living.

The objectives of the Summit were to:

- Evaluate the current and evolving landscape of national and state efforts to advance assisted living quality.
- Assess the challenges, identify opportunities, and lead on solutions for sustaining and building upon successes.
- Build plans to leverage opportunities to address strategic priorities for the future.
- Develop action plans for how collaboratives for large-scale, data-driven quality improvement (e.g., WCCEAL) may fit into the evolving landscape.

The Summit was held over two days (June 27-28, 2022) at the Wingspread Retreat and Conference Center in Racine, WI. Each day of the Summit featured panel presentations and discussions, along with a "breakout room" working session in small groups. Day 1 focused on WCCEAL and the Wisconsin Landscape. Day 2 focused on the National Landscape.

A total of 39 people participated in the Summit (26 in person and 13 virtually). Meridian Institute facilitated the Summit. A participant list is provided at the end of this document.

Prior to the Summit, all participants were provided with a Summit agenda and the following read-ahead materials:
- WI MCO Pay for Performance presentation
- The Long-Term Care Workforce Crisis: A 2020 Report
- The Imperative to Reimagine Assisted Living (Zimmerman et al. 2022)
- Implementing Large-Scale Data-Driven Quality Improvement in Assisted Living (Ramly et al. 2022)
- JAMDA Volume 23, Issue 2 (February 2022): Reimagining Long-Term Care
- Wisconsin ARPA Grant Opportunity Resource

The following pages provide a high-level recap of all the Summit sessions.

Day 1 – WCCEAL and the Wisconsin Landscape

Monday, June 27, 2022

Opening Session

Relevant Documents:
- Pre-Summit Survey Responses
- Summit Agenda
- Day 1 Notes
- Day 1 Slide Deck (slides 1-9)

Kevin Coughlin (Wisconsin DMS) provided opening remarks, indicating the importance of gathering both state and national leaders to think up ways for elevating the quality of care in assisted living, particularly by advancing collaboratives for large-scale, data-driven quality improvement.

Facilitator Molly Mayo (Meridian Institute) provided an overview of the responses from the pre-Summit survey, in which Summit participants were asked, "What is the single most important thing we can do to advance the quality of assisted living in Wisconsin/nationally?" A synthesis of responses is noted in the Day 1 Slide Deck (slides 5-7); full responses are noted in the Pre-Summit Survey Responses document.

Susan Nordman-Oliveira (UW-Madison) presented the inaugural Heather Bruemmer Award for Assisted Living Quality to David Zimmerman (Elder Justice Foundation), honoring the legacy of the late Ms. Bruemmer's contribution to the field. Mr. Zimmerman, in accepting the award, emphasized the critical time we are in for quality of care in assisted living, noting the rapid growth in assisted living facilities, the need for a resident-centered approach to care, and the importance of provider-led quality improvement.

Panel 1: Challenges and Opportunities

Relevant Documents:
- Summit Agenda
- Day 1 Notes

Panel 1 featured three speakers, each of whom provided an advocacy, payment, or regulatory perspectives on existing challenges in assisted living, aspirational goals to address those challenges, and possible steps to achieve those goals. The featured speakers included:

- Kim Marheine (Wisconsin BOALTC)
- Lisa Olson (Wisconsin DHS)
- Otis Woods (Wisconsin DHS)

Key points made by each speaker:

Kim Marheine (Wisconsin BOALTC)
- When assisted living residents are forced to move, they may question whether they have power, control, choice, and a sense of belonging.
- What does the concept of "home" mean today – and can assisted living facilities look at environmental features to enhance a resident's sense of being "home" (e.g., ability for residents to lock doors, have access to snacks when they want them, be more engaged)?
- Feeling at home goes beyond environmental factors, however – assisted living facilities should consider why someone would want to live in the facility as a replacement for their current home.
- How are needs previously being met by skilled nursing now being met in assisted living?

Lisa Olson (Wisconsin DHS)
- People are increasingly being given a choice on where they live for care (assisted living facility, at home, etc.).
- Conversations around assisted living are similar to those happening in the Medicaid space: setting and meeting goals around high quality outcomes for patients. As a purchaser of care, it only makes sense to invest in quality improvement.
- The state Medicaid office's role is to listen, learn, and adopt practices where appropriate.

Otis Woods (Wisconsin DHS)
- Historically, assisted living was designed to meet social needs. That reality is changing rapidly, in which medical needs also need to be met.
- Top of mind question: Will assisted living facilities be able to meet resident needs (e.g., sufficient numbers of trained CNAs, staff training expertise)?
- The sector is also changing, with more choice for where individuals are served (e.g., adult family homes, community-based care).

Additional notes, including Q&A responses, are provided in the Day 1 Notes.

Panel 2: Emerging Knowledge in Assisted Living

Relevant Documents:
- Summit Agenda
- Day 1 Notes
- Day 1 Slide Deck (slides 11-41)
- M3 Insurance Handout

Panel 2 featured five speakers, each of whom provided an overview of an emerging knowledge area from the past two years in the assisted living space. The featured speakers included:

- Edmond Ramly (UW-Madison)
- Dan Perron (Wisconsin DHS)
- Chris Kenyon (M3 Insurance)
- Scott Banken (West Bend Mutual Insurance Company)
- Dennis Winters (Wisconsin Department of Workforce Development)

Key points made by each speaker:

Edmond Ramly (UW-Madison) – Also see Day 1 Slide Deck (slides 12-19)
- <u>Presentation Topic</u>: Opportunities for quality improvements with data – learnings from two WCCEAL scalability pilot projects
- Why is assisted living facility participation in quality initiatives so low and how do we increase participation?
- Pilot studies indicate that support from a sponsor (e.g., provider association) helps keep facilities on top of participation (motivation, encouragement).

Dan Perron (Wisconsin DHS) – Also see Day 1 Slide Deck (slides 20-33)
- <u>Presentation Topic</u>: DQA quality survey results and advancing the sustainability of quality initiatives
- The Bureau of Assisted Living carried out a survey in April 2021 to understand quality assurance and quality improvement practices used in assisted living facilities. See the Day 1 Slide Deck (slides 20-33) for survey outputs and resulting DQA recommendations.
- The survey data was limited. There was not broad participation, and most respondents were from the management side of assisted living facilities.

Chris Kenyon (M3 Insurance) and Scott Banken (West Bend Mutual Insurance Company) – Also see M3 Insurance Handout
- <u>Presentation Topic</u>: Using risk management to incentivize quality and reduce risk in assisted living
- Risk management is tied to quality of care, and it impacts a facility's bottom line.
- A big incentive for facilities to invest in quality improvement: Avoiding potentially long legal processes in the event that a serious issue arises.
- Assisted living facilities have, on average, higher claim costs than skilled nursing facilities.
- Leading claims are attributed to falls, wounds, and behaviors. The top contributing factors to these claims are around staffing issues.
- The aging population is expected to continue outpacing the civilian labor force. As such, assisted living facilities need to start implementing staffing strategies now. See the M3 Insurance Handout for an example list of staffing strategies.

Dennis Winters (Wisconsin Department of Workforce Development) – Also see Day 1 Slide Deck (slides 34-41)
- <u>Presentation Topic</u>: Workforce challenges in assisted living and innovative alternatives to addressing workforce vacancies
- There are two challenges:
  - Macro – Finding enough workers (potential solutions: immigration, technology, helping the unemployed overcome barriers to get into the workforce [e.g., housing, skillsets, transportation])
  - Micro – Getting the available workforce into one's facility

Additional notes, including Q&A responses, are provided in the Day 1 Notes and Day 1 Slide Deck (slides 11-41).

Panel 3: Managed Care Organization Perspectives

Relevant Documents:
- Summit Agenda
- Day 1 Notes

Panel 3 featured five MCO representatives, who reflected on "pay for performance" approaches, incentivizing contracting for quality, and data driven quality improvement and payment systems. The featured speakers included:

- Angie Kieffer (Lakeland Care, Inc.)
- Margaret Kristan (iCare)
- Kris Kubnick (Inclusa, Inc.)
- Matt Moen (Community Care, Inc.)
- Nicole Pagliaro (My Choice Wisconsin)

Key points made by each speaker:

Angie Kieffer (Lakeland Care, Inc.)
- Lakeland Care initiatives that have been implemented include:
  - Having a quality team and a preventive care team (e.g., to reduce hospitalizations)
  - Staffing a behavioral health department to support care teams and providers (who face increased behavioral needs) to prevent crisis situations
  - Retention and recruitment workshops to help hire and maintain quality staff
- Lakeland encourages participation in WCCEAL and has even looked at adding WCCEAL as part of its provider onboarding process.
- Have considered paying providers for association memberships and also tiering payments based on association affiliation or WCCEAL participation.

Margaret Kristan (iCare)
Implemented an incentive program in which providers could earn additional PMPM (enhanced pay for performance) if they carried out quality improvement activities.
- Did not have high uptake in the incentive program. Currently looking for feedback on ways to modify the incentive program.
- Another incentive consideration: Paying residential providers a flat fee if they are part of WCCEAL or pursue regular satisfaction surveys.

Kris Kubnick (Inclusa, Inc.)
- Inclusa started incentivizing residential providers toward quality improvement starting in 2016. At the start, there was no specific target, and Inclusa asked providers to develop their own quality improvement mechanisms.
- Inclusa saw increased creativity from providers, as well as opportunities for providers to share learnings on how they were approaching quality.
- In 2022, the focus has been on putting funds toward staff recruitment and retention.
- Inclusa is shifting focus from simply passing on payments to providers to leveraging dollars (e.g., using payments to pay for association memberships, promote "training the trainer" events).
- Inclusa is also looking to build data sets for quality improvement and to increase access to a provider learning system.

Matt Moen (Community Care, Inc.)
- A common struggle for MCOs is how to get high-quality outcomes, especially when incentive payments (e.g., pay for performance) are one-time payments. For example, if providers knew that long-term payments for quality improvement were assured, they could plan for them in their rates.
- Community Care has invested in provider surveys, to understand needs, as well as in provider trainings (e.g., trauma-sensitive care).
- Community Care has partnered with Walgreens to provide COVID, influenza, and pneumococcal vaccines.

Nicole Pagliaro (My Choice Wisconsin)
- My Choice Wisconsin is very interested in provider feedback to improve quality of care for customers.
- As a new MCO compared to the others, My Choice Wisconsin has focused on both improving MCO performance as well as pushing for provider quality improvement.
- Implemented strategies:
  - Pre-site visits as part of the provider application process to understand training needs, offer resources, and build relationships
  - Pilot program: Proactive site visits to 1-2 bed AFHs with high behavioral needs – Not intended as a "punishment" visit but rather to understand what is/is not going well and how the MCO can assist the provider
  - Emergency discharge prevention program, aimed at understanding the reasons for emergency discharges and assisting members with transitions
  - "Tracking and training" program for providers to watch for issues that may arise (e.g., crisis prevention intervention training)

- Affirmed that while providers say they appreciate the one-payments, they would like to see them built into the rates.

Additional notes, including Q&A responses, are provided in the Day 1 Notes.

Panel 4: State Association Leader Perspectives

Relevant Documents:
- Summit Agenda
- Day 1 Notes
- Day 1 Slide Deck (slides 44-49)

Panel 4 featured the leaders from Wisconsin's four assisted living associations, who reflected on the need for systematic, non-regulatory approaches for improving quality, both within the state and nationwide. The panel also reflected on findings from the 2022 Long-Term Care Workforce Report. The featured speakers included:

- Rick Abrams (Wisconsin Center for Assisted Living)
- Lisa Davidson (Disability Service Provider Network)
- Mike Pochowski (Wisconsin Assisted Living Association)
- John Sauer (LeadingAge Wisconsin)

Key points made by each speaker:

Rick Abrams (Wisconsin Center for Assisted Living)
- We need to meet residents, their families, and facility staff where they are at.

Lisa Davidson (Disability Service Provider Network)
- A lot of smaller providers are located in the northern, rural regions of Wisconsin where the elder population is expected to grow the fastest.
- Part of the quality improvement process comes with understanding patient needs. For instance, is there a way to have a resident "trial period" to ensure that facilities have the appropriate training to meet patient needs in complex care situations?
- Due to staffing shortages, many facilities are utilizing staffing agencies at a very high cost, which means new people are providing care to residents every week. This doesn't build trust or quality.
- DSPN wants to invest in provider staff – pay people what they deserve, support training and further education (e.g., tuition reimbursement).
- DSPN would like to do more with WCCEAL, but DSPN would need more resources for participation. Many of DSPN's member providers don't have the capacity to do regular reporting or even attend an in-person training.

Mike Pochowski (Wisconsin Assisted Living Association)
- The reality is that there are more vacancies in the state's assisted living space alone than the sum of the entire Wisconsin workforce looking for a job.
- We need to keep rates transparent. Rates are often not high enough to cover staffing agency wages.

John Sauer (LeadingAge Wisconsin)
- The use of resident surveys is among the best features of WCCEAL. The surveys give providers metrics to establish accountability, which leads to quality improvement. Metrics also give providers a way to frame themselves as "providers of choice."
- A big question is how to sustain quality improvement:
  - WCCEAL is a good model, as well-intentioned providers are most well-equipped to improve quality.
  - Meaningful incentives can also push for quality improvement (e.g., regulatory relief, advantageous insurance rates)
- Would like the state to email all assisted living facilities that are not involved in WCCEAL to encourage participation.

Additional notes are provided in the Day 1 Notes and Day 1 Slide Deck (slides 44-49).

Day 1 Breakout Session

Relevant Documents:
- Summit Agenda
- Day 1 Notes
- Day 2 Notes
- Day 2 Slide Deck (slides 3-14)
- [Breakout Room Flipchart Photos for Rooms 2, 3, and 4](#)
- Breakout Room Notes for Room 2 and Room 4

The Day 1 Breakout Session was focused on brainstorming solutions and actions to address key challenges in assisted living today. Summit participants were broken up into four breakout groups, with each group rotating once through four breakout rooms. Each room was focused on a different topic:

- <u>Room #1 Topic</u> – What are the key challenges and opportunities in the current and evolving state and national landscape to advance assisted living quality?

- <u>Room #2 Topic</u> – How can collaboratives for large-scale, data-driven quality improvement (e.g., WCCEAL) fit into the evolving state and national landscape?

- <u>Room #3 Topic</u> – How can oversight, regulatory, and financing structures (e.g., ARPA initiatives) address strategic priorities for the future of assisted living quality?

- <u>Room #4 Topic</u> – What are the barriers and potential solutions to the workforce of the future in assisted living?

Key ideas and actions generated in each breakout room:

Room 1 – Key Challenges and Opportunities
- Five priority areas emerged:
  - Address the whole person – Medical, home, transportation, community engagement, levels of care to address acuity
  - Ensure funding matches the care (e.g., current Wisconsin rate bad initiative)
  - Worker training – Career ladders and lattices and building competency
  - Data – Use data to discern quality of life measures and outcomes
  - Define "aging in place" and make it a standard – Services to come to the person, not vice versa
- See the Day 2 Slide Deck (slides 5-14) for additional details.

Room 2 – Collaboratives for Large-Scale, Data-Driven Quality Improvement
- Ensure data generated through collaboratives are meaningful to all parties (providers, workers, residents, families, consumer advocates, public)
- For quality improvement initiatives to be sustainable, they should be fully funded. Small providers can be supported with upfront funding, though such providers would need to demonstrate results as a result of the funding (accountability measures).
- Quality improvement collaboratives may work best at the state-level (vs. the federal level) to maintain flexibility. However, state-based collaboratives should work with national providers to create consistent baselines of quality.
- For additional details, see the Room 2 Notes and [Breakout Room Flipchart Photos for Rooms 2, 3, and 4](#).

Room 3 – Oversight, Regulatory, and Financing Structures
- Four priority areas emerged:
  - Addressing Reimbursement Challenges
    - Redirect/clarify the task and scope for the consultants currently working on family care rate band development (process currently underway)
    - Effective use of AARPA Funding will help create proof of value for future changes in rates/reimbursement, especially informing the legislature on future reimbursement growth needs and opportunities.
  - Technology – Invest in technology structures for enhanced data collection to support service delivery and workforce retention.
  - Workforce/Careforce – Invest in education and training across employees (utilizing ARPA funding) and create sustainable workforce solutions (e.g., retention through structured career ladders and paths)
  - Consistent Collaborations – Involve all parties from the start to develop recommendations to address strategic priorities
- For additional details, see [Breakout Room Flipchart Photos for Rooms 2, 3, and 4](#).

Room 4 – Workforce
- Four priority actions emerged:
  - Inventory resources already available to assist with workforce recruitment
  - Make providers aware of said resources
  - Establish a consortium for a workforce pipeline (e.g., placing entities, state agencies, provider associations)
  - Develop expectations for compensation and benefits for direct caregivers
- For additional details, see the Room 4 Notes and [Breakout Room Flipchart Photos for Rooms 2, 3, and 4](#).

Day 2 – The National Landscape

Tuesday, June 28, 2022

Panel 1: National Initiatives and Developments

Relevant Documents:
- Summit Agenda
- Day 2 Notes
- Day 2 Slide Deck (slides 15-56)

Panel 1 featured four speakers, who provided an overview of national-level initiatives and developments surrounding quality improvement, evidence-based standards, and medical and mental healthcare. The featured speakers included:

- Chris Laxton (AMDA)
- Martha Roherty (ADvancing States)
- Lindsay Schwartz (Workforce & Quality Innovations, LLC, and Center for Excellence in Assisted Living)
- Sheryl Zimmerman (UNC)

Key points made by each speaker:

Chris Laxton (AMDA) – Also see Day 2 Slide Deck (slides 40-46)
- Obstacles to better clinical quality include:
    - Variability within/across states in defining assisted living, which affects licensing and regulatory requirements
    - Resistance among assisted living operators to offer health care services
    - Lack of national "best practices" in health care service delivery and oversight in assisted living
    - Political polarization
- Recruiting, training, and compensating an engaged careforce is the top priority today and into the future.
- Medical oversight is an important component of quality of care and consistency.

Martha Roherty (ADvancing States)
- Based on ADvancing States' member feedback, providers in 47 of 56 states/territories listed workforce as the top priority in assisted living.
- Providers are also looking for technical support from state government staff (e.g., understanding how they can access benefits, education on what Medicare does and does not pay for).
- Priorities for ADvancing States includes educating customers on what assisted living means and placing a greater focus on end-of-life care.

Lindsay Schwartz (Workforce & Quality Innovations, LLC, and Center for Excellence in Assisted Living) – Also see Day 2 Slide Deck (slides 47-56)
- Evidence-based practices are lacking in assisted living, particularly due to lack of data (including benchmarks).
- A national database could help to address these issues, including by disseminating results from assisted living research.

- There is also a need to encourage providers to participate in research, both to gather data and to help guide future research.

Sheryl Zimmerman (UNC) – Also see Day 2 Slide Deck (slides 16-39)
- In May 2021, 25 diverse stakeholders participated in two half-day retreats to discuss the status of assisted living. They identified five key tensions:
  - Regulation (oversight)
  - Financing (business model, access)
  - Acuity (medical, mental, dementia)
  - Workforce (challenges, ratios)
  - Models (services, housing)
- The stakeholders also identified 20 potential solutions. See the Day 2 Slide Deck (slides 16-39) for details.
- There are concerns and challenges related to medical and mental health care in assisted living, both regarding care (e.g., infection prevention, medication use, communication with changes on conditions) and outcomes (e.g., acute and chronic conditions, falls, depression, ER visits, hospitalizations).
- A 19-person expert panel came up with 43 consensus recommendations to address these challenges. See the Day 2 Slide Deck (slides 16-39) for details.

Additional notes are provided in the Day 2 Notes and Day 2 Slide Deck (slides 15-56).

Panel 2: National Initiatives and Developments

Relevant Documents:
- Summit Agenda
- Day 2 Notes
- Day 2 Slide Deck (slides 57-59)

Panel 2 featured four leaders of national organizations, who reflected on long-term care needs and promising opportunities for quality improvement. The featured speakers included:

- LaShuan Bethea (AHCA/NCAL)
- Ruth Katz (LeadingAge)
- John Schulte (Argentum)
- Lori Smetanka (National Consumer Voice for Quality Long-Term Care)

Key points made by each speaker:

LaShuan Bethea (AHCA/NCAL)
- There is a need to determine a long-term strategy for solving the workforce challenge in assisted living.

- Two opportunities to address this issue:
  - Hear from workers about what's attractive to them in the workforce
  - Coordinate care in population health

Ruth Katz (LeadingAge)
- LeadingAge is working on two major issues:
  - Workforce – Wages, benefits, training, career ladders, and career pipeline (including immigration)
  - Financing – Particularly focused on low-income populations (e.g., housing challenges) and public health (e.g., vaccines, COVID relief)

John Schulte (Argentum) – Also see Day 2 Slide Deck (slides 57-59)
- Assisted living staff wages offered by providers is not competitive with other jobs on the market.
- Assisted living providers don't have robust policies and procedures (e.g., constantly changing COVID guidelines).
- Residents often need to seek medical care from third parties (e.g., getting physical therapy through an outside provider).

Lori Smetanka (National Consumer Voice for Quality Long-Term Care)
- There is a lack of clarity for consumers about the field of assisted living overall (e.g., licensure, services available).
- Due to HCBS waivers, there is greater access to assisted living, and more people are choosing assisted living over nursing homes. Even people with higher care needs often look to assisted living first.
- As such, workforce competencies and sufficient specialized training become necessary to avoid negative outcomes for residents (difficult given existing workforce challenges).
- Consumer protection considerations include assisted living report cards, contractor transparency requirements, robust resident protections, and increased support and funding for ombudsman programs and resident and family councils.

Additional notes are provided in the Day 2 Notes.

"Pitch Presentations"

Relevant Documents:
- Summit Agenda
- Day 2 Notes
- Day 2 Slide Deck (slides 61-81)

This Summit session featured three short "pitch" presentations that addressed the question: "How do we advance collaboratives for large-scale, data-driven quality improvement over the next 5 years?" The three "pitch" presenters included:

- Edmond Ramly (UW-Madison)
- Curtis Cunningham (Wisconsin DMS)
- Alfred Johnson (Wisconsin DQA and NARA)

Key points made by each speaker:

Edmond Ramly (UW-Madison) – Also see Day 2 Slide Deck (slides 62-67)
- Pitch: Advancing Collaboratives by Reimagining Long-Term Care – Implement strategies that re-think how we carry out long-term care into the future.
- There is a need to:
    o measure *and* compare quality within the assisted living space – and lend support to providers to improve quality.
    o explore the potential for sponsors outside of associations (e.g., MCOs).
    o understand how assisted living facilities are adapting to unique needs.
    o Create stakeholder-driven, public-private partnerships to address quality improvement.

Curtis Cunningham (Wisconsin DMS) – Also see Day 2 Slide Deck (slides 68-80)
- Pitch: Advancing Collaboratives by Leveraging Federal Funding – Convene a working group to explore the potential for an HCBS grant from funds allocated through the American Rescue Plan Act.
- $700 million has been made available, via ARPA, to re-invest into long-term care projects. Of that amount $30 million is being offered via a grant program to invest in innovation, address workforce challenges, and target long-term care efforts that have the best chance at access.
- We should explore ways to use ARPA HCBS grant funding to advance ideas and solutions discussed at this Summit.

Alfred Johnson (Wisconsin DQA and NARA)
- Pitch: Advancing Collaboratives by Crowdsourcing Ideas – Utilize convenings and other collective efforts to crowdsource ideas for impact (e.g., pre-Summit survey).
- There is a need for continue collaboration on solution-building in assisted living.
- We need to collaborate on "raising the bar" on standards and regulations to ensure that anyone who wants to provide assisted living care does so at the highest possible level.

Additional notes are provided in the Day 2 Notes and Day 2 Slide Deck (slides 61-81).

Day 2 Breakout Session

Relevant Documents:
- Summit Agenda
- Room 1 Virtual Flipchart
- Breakout Room Flipchart Photos for Room 2 and Room 3

The Day 2 Breakout Session aimed to build on the three pitches that were presented, specifically moving from ideas to action. Summit participants were broken up into three breakout groups, with each group stationed in a specific room. Each room was dedicated to one of the three "pitch" topics:

- Room #1 Topic – Advancing Collaboratives by Reimagining Long-Term Care – Implement strategies that re-think how we carry out long-term care into the future

- Room #2 Topic – Advancing Collaboratives by Leveraging Federal Funding – Convene a working group to explore the potential for an HCBS grant from funds allocated through

the American Rescue Plan Act

- <u>Room #3 Topic</u> – Advancing Collaboratives by Crowdsourcing Ideas – Utilize convenings and other collective efforts to crowdsource ideas for impact (e.g., pre-Summit survey)

Key ideas and actions generated in each breakout room:

Room 1 – Reimagining Long-Term Care
- There is a need for a national data repository, both to establish provider benchmarking but also to better enable consumer choice. This will also help to create common definitions of assisted living to measure and improve quality.
- Enabling conditions:
  - o Development of disclosures that providers can voluntarily use (Agency for Healthcare Research and Quality could assist with this)
  - o Baseline data collection (CEAL could assist with this)
  - o Need for seed and ongoing funding
- Additional relevant players include National Institute on Aging and the Patient-Centered Outcomes Research Institute
- For additional details, see the Day 2 Notes and Room 1 Virtual Flipchart.

Room 2 – Leveraging Federal Funding
- Grant ideas include:
  - o Expand/support WCCEAL (e.g., augment the organization's reach, add a platform for educational resources)
  - o Training (e.g., expand CNA training)
  - o Technology (e.g., pilot for "smart assisted living" on how to navigate licensing regulations, telehealth)
  - o Workforce (e.g., benefits for retention)
  - o Business Collaborations (e.g., providers, assisted living facilities, and MCOs to come up with strategies for whole-person care)

  - o Provide training for people who want to enter the assisted living space (e.g., business plan education)
- For additional details, see the Day 2 Notes and Breakout Room Flipchart Photos for Room 2 and Room 3.

Room 3 – Crowdsourcing Ideas
- A key to building collaborations in the assisted living space is to establish the fundamentals for such collaboration. This includes determining who should be at the table, understanding opposing views and ripple effects of actions, determining shared ownership and roles, and aligning interests and values across stakeholders.

- Key action steps to build a successful collaborative include:
  - Identifying stakeholders
  - Defining goals
  - Hosting town hall meetings of stakeholders
  - Developing rules of engagement
  - Defining the problem(s) for the collaborative to solve
  - Communicating the work of the collaborative to the public/interested parties (and seeking feedback from such parties)
  - Developing a proof of concept for a workable collaborative
- For additional details, see the Day 2 Notes and [Breakout Room Flipchart Photos for Room 2 and Room 3](#).

Closing Session

Each Summit participant was given the opportunity to indicate what they will take away from the Summit and what action they can commit to as a result of Summit discussions. One topic that arose was how WCCEAL can expand to other populations beyond the elderly. Additionally, Sheryl Zimmerman (UNC) and Edmond Ramly (UW-Madison) committed to writing an editorial summary of the Summit.

Kevin Coughlin (Wisconsin DMS) provided closing remarks, noting the beneficial nature of gathering together as a community of practice to generate ideas for collaborative action in the area of assisted living quality improvement. Mr. Coughlin proposed an annual convening of state and national assisted living leaders in future, with most years being a virtual but also prioritizing in-person convenings on a regular interval (e.g., every 5 years). Summit participants expressed support for this idea.

List of Participants

Rick Abrams
CEO, Wisconsin Center for Assisted Living
rick@whcawical.org

Scott Banken
Casualty Claims Director, West Bend Mutual Insurance Company
sbanken@wbmi.com

LaShuan Bethea
NCAL Executive Director, AHCA/NCAL
lbethea@ncal.org

Erin Boutan
Director of Quality Advancement and Communications, Wisconsin Assisted Living Association
eboutan@ewala.org

Kevin Coughlin
Policy Initiatives Advisor-Executive, Wisconsin DMS
kevin.coughlin@dhs.wisconsin.gov

Curtis Cunningham
Assistant Administrator for Benefits and Service Delivery, Wisconsin DMS
curtis.cunningham@dhs.wisconsin.gov

Lisa Davidson
CEO, Disability Service Provider Network
ldavidson@dspn.org

Lelia Gessner
Project Assistant, QID, UW-Madison
gessner2@wisc.edu

Alfred Johnson
Deputy Administrator, Wisconsin DQA, and President, NARA
alfred.johnson@dhs.wisconsin.gov

Ruth Katz
Senior Vice President, LeadingAge
rkatz@leadingage.org

Chris Kenyon
Managing Director, M3 Insurance
chris.kenyon@m3ins.com

Angie Kieffer
Provider Relations and Contracting Director, Lakeland Care, Inc.
angela.kieffer@lakelandcareinc.com

Lori Koeppel
CRC Content Coordinator, Research Analyst, QID, UW-Madison
lmkoeppel@wisc.edu

Margaret Kristan
Vice President of Long Term Care and Community Inclusion, iCare
mkristan@icarehealthplan.org

Kris Kubnick   Chief Member Experience Officer, Inclusa, Inc.
kris.kubnick@inclusa.org

Ann Lamberg   Bureau of Quality and Oversight Deputy Director, Wisconsin DHS
ann.lamberg@dhs.wisconsin.gov

Chris Laxton   Executive Director, AMDA
claxton@paltc.org

Kim Marheine   State Ombudsman Designee, Wisconsin BOALTC
kim.marheine@wisconsin.gov

Janice Mashak   Vice President of Member Services and Innovation, LeadingAge Wisconsin
jmashak@leadingagewi.org

Erica Mishek   Project Coordinator, QID, UW-Wisconsin
emishek@wisc.edu

Matt Moen   Director of Provider Management, Community Care, Inc.
matthew.moen@communitycareinc.org

Susan Nordman-Oliveira   Director QID and Research Scientist, UW-Madison
susan.nordmanoliveira@wisc.edu

Lisa Olson   Medicaid Director, Wisconsin DHS
lisaa.olson@dhs.wisconsin.gov

Nicole Pagliaro   Director of Provider Services, My Choice Wisconsin
nicole.pagliaro@mychoicewi.org

Daniel Perron   Bureau of Assisted Living Director, Wisconsin DHS
daniel.perron@dhs.wisconsin.gov

Mike Pochowski   President and CEO, Wisconsin Assisted Living Association
mpochowski@ewala.org

Edmond Ramly   Assistant Professor of Family Medicine and Community Health and Affiliate Faculty of Industrial and Systems Engineering, UW-Madison
ramly@wisc.edu

Martha Roherty   Executive Director, ADvancing States
mroherty@advancingstates.org

John Sauer   President and CEO, LeadingAge Wisconsin
jsauer@leadingagewi.org

John Schulte   Vice President of Quality Improvement, Argentum
jschulte@argentum.org

Lindsay Schwartz	Founder and Principal, Workforce & Quality Innovations, LLC, and Board Chair, Center for Excellence in Assisted Living lindsay@wqinnovations.com
Todd Smet	Director of Membership and Development, Disability Service Provider Network tsmet@dspn.org
Lori Smetanka	Executive Director, National Consumer Voice for Quality Long-Term Care lsmetanka@theconsumervoice.org
Krista Willing	Assistant Administrator of Systems, Fiscal, and Operations, Wisconsin DMS kristae.willing@wisconsin.gov
Dennis Winters	Chief Economist, Wisconsin Department of Workforce Development dennis.winters@dwd.wisconsin.gov
Otis Woods	Administrator, Wisconsin DHS otis.woods@dhs.wisconsin.gov
David Zimmerman	Board of Directors Vice President, Elder Justice Foundation dvdzmrmn@gmail.com
Sheryl Zimmerman	Distinguished Professor of Social Work and Co-Director of Aging, Disability, and Long-Term Care, UNC sheryl_zimmerman@unc.edu

Facilitation Team

Molly Mayo	Senior Partner, Meridian Institute mmayo@merid.org
Ian Yue	Mediator and Program Manager, Meridian Institute iyue@merid.org