Older Adult Services Advisory Committee
Point of Entry Work Group

Date: January 5, 2005

Location: East Central Illinois Area Agency on Aging, Bloomington

Attending: Jonathan Lavin (Co-Chair), Paul Bennett (Co-Chair), Ross Grove (Illinois Department on Aging), Carol Aronson, Betsy Creamer, Frank Daigh, Chloe Frooninckx, Mary Pat Frye, Martha Holstein, Marsha Johnson, Shawn J. Lewis, Rebecca Lurfelt, Daniel McCloud, Phyllis Mitzen, Marsha Nelson, Laura Prohov, Susan Real, Amy K. Reeser, Julie Seline, Teva Shirley, Deb Sitz, Courtney Snyder, Debra Verschelde, Cathy Weightman-Moore

Paul Bennett called the meeting to order at 10:15 AM. Participants introduced themselves to the group.

Minutes of the December 13 Conference Call Meeting – Martha Holstein moved and Chloe seconded a motion to accept the minutes of the December 13 Conference Call. The motion carried. Jon Lavin thanked the Work Group for the edits of the chapter and reported that they were submitted as agreed by the Work Group.

Neutrality Discussion

Martha Holstein and Phyllis Mitzen lead a discussion of the neutrality issue. The Work Group identified the following conclusions related to this issue:

Conflict of Interest –

a. Avoid actions that lead to the private gain of anyone claiming they are helping the client
b. Be professional and loyal to the discipline above any particular employing or funding agency
c. Don't steer to a particular agency or service. Mitigate bias using whatever mechanisms exist
d. Understand the bias of the service delivery agency
e. Avoid any extra motivation for making a referral (if the Day Services needs clients, don't send a client to it unless it meets the Client's needs/not the centers needs
f. Attempt to become the neutral and professional clearance for all service without any ties or obligations to a service provider
g. Screen out clients that are not right for a service – dissuade participation if not right

Promotion of Informed Choice

a. Always begin by defining the need of the client first and foremost.
b. Shape choices/provide options towards individual choice
c. Embrace a report card to determine if the service meets the needs and is complete
d. Know your resources – visit the service location in order to understand what constitutes an appropriate client for the service
e. Have a knowledge of all services and interventions in order to understand the real need and what can or can not be met

    f. Read the guidance and publications that explain a service

    g. Understand the motivation of the caller – a child may have the wrong reasons for asking for a particular service

    h. Don't let the concept of informed consent confuse the needs of the client – health care recipients need guidance and support often more than a choice

Quality Assurance

    a. Assure that monitoring includes quality, performance, accuracy of the information, and choices offered. It was suggested that peer group reviews are very useful towards the goal of standardizing the service and sharing values amongst the agencies.

    b. It was suggested that tracking the types and frequency of requests is very important to assuring that resources, information and service needs are addressed by the system.

    c. Provide training at the highest levels to assure that the concepts, professionalism and motivations are correct for the delivery of the consultation services.

    d. Require a professional staff that is dedicated to client services.

The group reviewed Ombudsman standards to identify mechanisms for building firewalls between the Consultation/Case Management and the sponsoring organization.

Ross Grove was asked to compare the existing rules for neutrality for the next meeting including AIRS, Title III of the Older Americans Act, Community Care Program and Ombudsman services.

In summary, the Work Group concluded that the existing mechanism appears to be adequate for separating the organizational, financial and service needs of an agency from the required objectivity and loyalty of the consultation service to the client. We discussed if multi-service providers have a better and more complete understanding of the choices and needs of their clientele over organizations that provide one service or organizations that have a profit motive. Community focal points have an advantage as Coordinated Points of Entry agencies as they have a natural and broad based constituency rather than a single need clientele. The Work Group identified the importance of monitoring neutrality and providing clarity for the requirement that the service not be provided to benefit any individual, sponsoring agency or any other agency.

Presentation on Development of Information Services in North Carolina

Paul Bennett presented an article on the development of a senior information service in North Carolina. The presentation is attached to these minutes

Next Meeting

It was agreed that a presentation on the Aging and Disability Resource Center was important at this time and we asked to meet at the Decatur Center with the Rockford ADRC invited to co-present.

It was agreed that we can begin putting together standards for the Coordinated Point of Entry. At the next meeting, we will identify what we have agreed to and what is missing in order to define our remaining work on this issue.

Meeting was adjourned at 3 p.m.