

ADRC Partnership Self-Assessment Readiness Tool

Instructions: This is a self-administered ADRC Readiness Review intended to indicate the progress toward building the organizational relationships necessary for the success of an ADRC partnership in California. Forming an ADRC partnership and reaching agreements among ADRC core and extended partner organizations about LTSS system improvements takes time. With this tool, core partners can assess their own level of readiness to finalize details necessary to meet the State's ADRC Designation Criteria. Scoring is a self-assigned indication of the progress and the likelihood that ADRC State Designation Criteria could be met within 12 months. Consult the State's ADRC Designation Criteria, the ADRC Designation/Re-Designation Process (2019) and the ADRC Designation/Re-Designation Evaluation Tool for more information about what documentation would be needed to demonstrate a fully functional ADRC partnership.

Assign points for each planning topic item. Point values mean the ADRC partnership has achieved: 0 = No Progress, 1 = Discussion and Planning, 2 = Partial Implementation, 3 = Full Implementation, 4 = Documentation Level of Achievement

ADRC Partnership and LTSS System Planning

#	Readiness Statement	ILC Core Partner Score	AAA Core Partner Score	Other Core Partner as appropriate Score
1	Core partners have together, provided leadership in the local community to find ways to streamline the public's access to public and privately funded LTSS services. Leadership has been collaborative and has taken place over the previous year or more.			
2	Core partners have specific plans for how people in their community could benefit by greater coordination across LTSS organizations, streamlined access to			

SCORING: 0 = NO PROGRESS, 1 = DISCUSSION AND PLANNING, 2 = PARTIAL IMPLEMENTATION, 3 = FULL IMPLEMENTATION, 4 = DOCUMENTATION LEVEL OF ACHIEVEMENT

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	program applications and broader information about all their LTSS service options. Meetings and plans are documented.			
3	Core partner organizations have participated in the SCAN Foundation Regional Collaborative, federal ACL Collaborative grant activities, collaborative funding applications and/or other initiatives where they have worked successfully toward common goals.			
4	Core partners have reviewed and discussed the State ADRC Designation Criteria and the Key Indicators and have a solid understanding of services and resources that are needed to support an ADRC partnership over time.			
5	Core partners have a solid understanding of one another's expertise and have listed extended partner organizations that provide services to the various sub-groups of LTSS consumers; older adults, adults with disabilities, people with intellectual disabilities, people with traumatic brain injury, adults with mental illness and others.			
6	Core partners have had discussions and have specific, documented plans for the roles and responsibilities in an ADRC partnership; Advisory Committee, marketing, reporting, quality, etc.			
7	Core partners believe that together, they can meet the requirements in the State's ADRC Designation Criteria and Key Indicators in 6-12 months.			
8	Core partners have set specific priority goals for streamlining and expediting local consumers' access to LTSS public and privately funded benefits and supports			

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#	Readiness Statement	ILC Core Partner Score	AAA Core Partner Score	Other Core Partner as appropriate Score
	regardless of age, disability or income level; including those LTSS benefits financed by Medi-Cal, Medicare the Veterans Health Administration.			
9	Core partners have agreed on their shared capabilities to produce data relative to the four key ADRC service elements and the demographics of LTSS consumers in the area.			
10	Core partners have inventoried IT resources (data management tools currently in use) that can be shared to accomplish ADRC goals (client demographics, provider database(s) and others) and reporting responsibilities.			

ADRC Advisory Committee

#	Readiness Statement	ILC Core Partner Score	AAA Core Partner Score	Other Core Partner as appropriate Score
11	Core partners have identified and committed to organizational support for an ADRC Advisory Committee; either a function of an existing group or a brand new group dedicated to ADRC development and improvements over time; who will convene, who will staff, who will follow-up, who will recruit, etc.			
12	Representation for Advisory Committee membership has been discussed and adopted; which stakeholder organization representatives and including people with lived experience with LTSS.			

#	Readiness Statement	ILC Core Partner Score	AAA Core Partner Score	Other Core Partner as appropriate Score
13	An ADRC Advisory Committee has been meeting regularly. <i>(Assign 4 points for over one year, 3 points for at least 6 months, 2 points for 3 months, 1 point for initial organizational meeting and 0 points for no meetings.)</i>			

ADRC Partnership Finances, Sustainability and Staffing

#	Readiness Statement	ILC Core Partner Score	AAA Core Partner Score	Other Core Partner as appropriate Score
14	One organization has agreed to be the fiscal agent for the ADRC partner organizations and will adhere to a locally agreed manner of sharing funding if/when there is a funding award. <i>(Assign 4 points for Yes, 0 points for No)</i>			
15	Core partners have discussed and have a detailed plan for how the local LTSS programs and benefits are funded currently and could be sustained over time; State, federal and private sources; including Medi-Cal, Older Americans Act, Rehabilitation Act, Lanterman Act, Veterans Health Administration, grants and others.			
16	Core partners have discussed and documented specific ideas for efficiencies for LTSS programs intake, reducing administrative duplication of functional assessments and streamlining assistance with applications for Medi-Cal eligibility.			
17	Core partners have adopted person-centered practices and have ensured those practices are used by staff who interact with the public.			

#	Readiness Statement	ILC Core Partner Score	AAA Core Partner Score	Other Core Partner as appropriate Score
18	Core partners have met with front-line staff and explored the general principles of No Wrong Door and the ADRC partnership and how it might affect their job.			

Service Functions

The four ADRC service elements required by State law (WIC 9120) are common entry points to a No Wrong Door LTSS system. These entry points are delivered by either core or extended ADRC partners even though they are typically funded in a variety of ways and exist under many different local program names. Planning an ADRC partnership explores how these four elements exist locally, which local organizations provide similar services and what local LTSS systems improvements can be made so people find the services that are right for them with the least amount of time and trouble. Progress on coordinating and streamlining these elements are key to achieving State ADRC Designation.

Service Function #1 – Enhanced Information and Referral/Awareness

#	Readiness Statement	ILC Core Partner	AAA Core Partner	Other Core Partner as appropriate
19	Core partners have identified all the provider organizations in the area that offer LTSS information assistance/referral even though it might have a different service title or organization name; for example, 211, I&A, I&R, Senior Call Center, First Connect, Crisis Line, etc.			
20	Core partners have identified the call center referral databases used by core and extended partners that could be shared and/or expanded to provide consumers with broader scope of LTSS information and service options with one call.			

#	Readiness Statement	ILC Core Partner	AAA Core Partner	Other Core Partner as appropriate
21	Consumers have access to a broad LTSS provider information database(s) that are searchable and include public and private LTSS programs, providers and benefits.			
22	Core and/or extended partners that provide LTSS information are staffed with trained and cross-trained experts in LTSS information and call center response techniques; trained in AIRS or similar technical training and cross-trained by experts in services other than those offered by their employer.			
23	Core partners have agreed on plans to streamline and coordinate call center responses to LTSS inquiries; for example, warm transfer technology, shared intake protocols and forms shared and used across organizations.			

Service Function #2 – Person-Centered Options Counseling

#	Readiness Statement	ILC Core Partner	AAA Core Partner	Other Core Partner as appropriate
24	Core partners have a thorough understanding of one-on-one Person-Centered Options Counseling and the four components of the service; interactive interview, decision-support, personal goal-setting, follow-up.			
25	Core partners have listed organizations in the area that have similar, one-on-one decision-support and LTSS counseling services and how people will be referred for the service.			
26	Core partners have agreed on plans for how they will provide training in motivational interviewing or similar person-centered practices skills training for Options Counselors.			

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Service Function #3 – Short-Term Service Coordination

#	Readiness Statement	ILC Core Partner	AAA Core Partner	Other Core Partner as appropriate
27	Core partners have listed local provider organizations that offer LTSS case management and personalized service coordination.			
28	Core partners have agreed on new ways for coordinating LTSS, housing and transportation requests for people with urgent need; those who are at risk for health, safety, shelter, food, abuse, institutionalization and other crisis events.			
29	Core partners have conducted multi-organization planning discussions in order to coordinate responses for urgent situations; for example, with APS, law enforcement, hospitals and other first responders.			

Service Function #4 – Transition Services

#	Readiness Statement	ILC Core Partner	AAA Core Partner	Other Core Partner as appropriate
30	Core partners have listed and had discussions with organizations in the area that provide facility transition services; hospital-to-home and nursing facility-to-home.			
31	Person-centered practices skills training has been made available to Transition Service providers.			
32	Core partners have held planning discussions with the MDS responder organization and the organization that provided CCT, if there is one. Additional planning partners might include home health agencies, hospitals and nursing facilities in the area to participate in improving facility transitions.			

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Quality

#	Readiness Statement	ILC Core Partner	AAA Core Partner	Other Core Partner as appropriate
33	Core partners have plans for how consumers provide feedback about the quality of services from ADRC partner organizations.			
34	Core partners have a plan for how the ADRC Advisory Committee will be informed of and give input to continuous quality improvement.			

Marketing

#	Readiness Statement	ILC Core Partner	AAA Core Partner	Other Core Partner as appropriate
35	Core partners have agreed on plans for marketing and branding the local ADRC partnership.			

Commitment to ADRC Designation

#	Readiness Statement	ILC Core Partner	AAA Core Partner	Other Core Partner as appropriate
36	Core partners communicate regularly and commit to continue the work towards meeting the State's ADRC Designation Criteria within 12 months.			

Scoring

ADRC Partnership Self-Assessment Readiness Tool	ILC Core Partner	AAA Core Partner	Other Core Partner as appropriate
Total Points Each Core Partner (Add the Scores of the 36 Statements by each Partner)			
Total Partnership Score (Summation of Partner Scores)			
Total Partnership Score Average (Total Partnership Score divided by the number of Partners)			

Scoring Comparison Table

Scoring Table	Percentage of Possible Points	Estimated Time for Readiness (dependent of resources and time allotted to planning and implementation)
115 points or higher	>80% of possible score	Ready to finalize Partnership Plans
101 points or higher	>70% of possible score	Likely ready in 12 months
86 points or higher	>60% of possible score	Possibly ready in 12 months
Below 86 points	<60% of possible score	Likely needs more than 12 months

Comments:

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Signature, Title, Organization

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ILC Core Partner

AAA Core Partner:

Other Core Partner:

Date:
