



Center for the Advanced Study of Aging Services

SCHOOL OF SOCIAL WELFARE
UNIVERSITY OF CALIFORNIA, BERKELEY

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School of Social Welfare
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Center's Web Site:

<http://cssr.berkeley.edu/aging>

Center's Faculty & Staff:

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The Center for the Advanced Study of Aging Services conducts activities to improve services for California's elderly through research, education & collaboration. These activities are made possible through the generous support of the Kleiner Family Foundation and the JM Long Foundation.

Issue Highlights...

- Gerontological Social Work Training Model Implemented
- Strategic Planning Initiative for Older Californians
- Personnel Needs in Aging Services
- Center's 2000-01 Scholarship Recipient

Assuring Quality in Care Management Under Long-Term Care Insurance


The Center recently completed a three-year investigation of the adequacy of consumer protection policies and procedures in long-term care insurance. The project represented a comprehensive effort to (1) investigate the experience of long-term care insurance policyholders in light of existing regulations and standard practices in care management; (2) develop recommended protocols and processes for assuring the quality of services provided under long-term care insurance; and (3) formulate policy recommendations for insurance carriers, care management organizations, regulatory agencies and consumer groups in order to facilitate implementation of these quality assurance practices. The project involved a collaboration of the Center, the California Department of Health Services, and participating insurance carriers and care management provider agencies.

The research sample consisted of 35 California residents, ages 54 to 86, who had purchased long-term care insurance through the California Partnership for Long Term Care (CPLTC), a public-private partnership between long-term care insurance carriers and MediCal (California's Medicaid program), and who attempted to activate their benefits between August 1, 1998 and June 30, 1999. These 35 policyholders were followed for a total of six months from the date of their initial eligibility assessment, including detailed reviews of individual eligibility assessments, care plans, progress notes, and insurance claims, in light of CPLTC regulations and established practice standards. Nineteen of the 35 policyholders also received two in-person interviews and four monthly telephone interviews during the six month period.

Policyholders generally were satisfied with the services they received, both from care managers and from direct service providers. Policyholders' basic service needs appeared to be met in most cases, although two-thirds of policyholders had at least some unmet needs. Quality assurance policies and procedures established under Partnership regulations generally were

found to be useful for consumer protection, although the research identified a number of gaps in implementation.

The research project has resulted in several newly developed products, including a standardized assessment tool, detailed protocols and procedures for care planning and monitoring, and quality assurance recommendations.

This project was made possible through the generous support of The Retirement Research & AARP Andrus Foundations. 

Newly Developed Tools for Enhancing Quality Assurance in Long-Term Care Insurance

- Standardized assessment tool, reflecting CPLTC and Kassebaum-Kennedy tax-exempt criteria;
- Protocols and procedures for developing care plans and monitoring care;
- Specific quality assurance recommendations designed to improve the quality and consistency of care management services.

Gerontological Social Work Training Model Implemented

The Center for the Advanced Study of Aging Services is pleased to announce the recent activities of the Hartford Bay Area Practicum Consortium. The Consortium consists of the schools of social work at the University of California at Berkeley, San Francisco State University, and San Jose State University, and five Bay Area county departments of aging and adult services, including Alameda, Contra Costa, San Francisco, San Mateo, and Sonoma counties. Through a 3-year geriatric social work training grant from the John A. Hartford Foundation of New York, the Consortium has implemented an innovative training model for gerontological social work in these public sector aging service systems.

Fourteen MSW students have recently completed their first semester in the Hartford Bay Area Practicum Project. The three first-year students receive annual stipends of \$5,000 and eleven second-year students receive stipends of \$7,000. All students participated in a comprehensive rotation through the programs administered by their assigned department during the first 6-8 weeks of their internships, and have been placed in a specific program for the remainder of their internship to learn skills training in providing services to clients and families enrolled in that program. In addition to the program rotations and orientation, students attend an aging seminar series designed to introduce students to the field of gerontological social work. Two seminars have been held thus far, the first an introduction to the Hartford Project and overview of California's aging service system, and the second a workshop on the aging process. The next seminar will be held on January 26, 2001 on the topic of "Competency Determination and Informed Consent" with Becky Cox White from Chico State University, author of *Competence to Consent*.

The Center for the Advanced Study of Aging Services has developed a website for the Hartford Consortium project. The website describes the mission and structure of the project, and provides background information, a description of consortium members, and general information for those interested in learning more about the project. Relevant and related websites are currently listed and project updates and training material will soon be accessible through the website. Please visit the Hartford Bay Area Practicum Consortium website at <http://cssr.berkeley.edu/hartford>. Additional information on other Hartford Training Projects is available on the website of the coordinating organization, the New York Academy of Medicine, <http://www.nyam.org>. ◀

2000-01 Scholarship Recipient

Laura Guske was awarded the 2000-01 Center for the Advanced Study of Aging Services Scholarship for her academic and professional promise and demonstrated potential for making a significant contribution to the field of aging. Ms. Guske is a second year student in the Gerontology concentration in Berkeley's MSW program.

Ms. Guske received her undergraduate degree in Sociology from California State University, Fresno. Before attending graduate school, she did extensive work at an Assisted Living Facility and volunteered in nursing homes. Ms. Guske completed her first year internship at the City of Fremont, Senior Support Services, where she provided case management services to frail elders. This year, she is continuing her field work at Laguna Honda Hospital, as the social worker for 30 residents.

The scholarship award was presented by Lisa Charnoff, Esq., for the Kleiner Family Foundation, at a November 20th ceremony held at the Women's Faculty Club. The ceremony was presided by James Midgley, Dean of the School of Social Welfare, and Mary Ann Mason, Dean of the Graduate Division at the University of California at Berkeley. ▶



(left to right) Rafael Herrera, Director of Admissions, Mary Ann Mason, Dean of the Graduate School, Laura Guske, and Lisa Charnoff, Kleiner Family Foundation.

Strategic Planning Initiative for Older Californians

In 1999, the California legislature passed and Governor Davis signed into law SB 910. This law calls upon the Secretary of California's Health and Human Services Agency to develop, by July 2003, a statewide strategic plan for California to address the impending demographic, economic, and social changes triggered by California's aging and increasingly diverse population. The University of California was asked to assist in the development of this strategic plan through its California Policy Research Center (CPRC) by producing detailed background information and analysis.

Professor Andrew Scharlach is serving as the chair of a Working Group of research experts convened by the CPRC. In addition Professor Scharlach is working with Fernando Torres-Gil of UCLA to develop a policy report that summarizes the key findings of the Working Group, outlines the challenges facing California, and provides recommendations for future action. This report, to be completed in January, will be presented at a legislative hearing before the Senate Sub-Committee on Aging and Long Term Care in the Spring.

The CPRC Work Group participants are comprised of experts in gerontology from the UC system and other universities in California. The Work Group participants are writing comprehensive research reports that summarize existing knowledge and needs areas. Dr. Brian Kaskie serves as the staff director.

The final detailed report of the project findings, will include the following components: (1) a description of current state resources (e.g. programs and expenditures) directed primarily to California's older population; (2) a summary of existing knowledge regarding the current and projected future needs of the state's aging population (e.g. demographics of the population, their economic well-being, and their needs for health and long-term care services, housing, transportation); and (3) an analysis of currently available resources in light of anticipated future needs, including a summary or major gaps that have been identified to date. For more information about the CPRC and its projects, visit its website at <http://www.ucop.edu/cprc>. ◀

CPRC-SB910 Work Group Participants

1. Demographics of Aging – Ron Lee (UC Berkeley) & Valentine Villa (UCLA)
2. Economic Status of the Elderly – Kathleen McGarry (UCLA)
3. Employment and Retirement – Irene Yen & Ed Yelin (UCSF)
4. Health Status and Service Needs – Bill Satariano (UC Berkeley)
5. Mental Health Status and Service Needs – Brian Kaskie (UCSF)
6. Long-Term Care – Charlene Harrington, et al. (UCSF)
7. Family Care Giving – A. Scharlach
8. Housing for Older Adults – Jon Pynoos (USC)
9. Assisted Living – Bob Newcomer (UCSF)
10. Transportation and Mobility – Martin Wachs (UC Berkeley)
11. Successful Aging – Teresa Seeman (UCLA)



Advisory Committee

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On Lok Senior Health Services

Diane Driver, Coordinator
Center on Aging
University of California

Rita Ghatak, Assoc. Dir.
International Longevity Center

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Marty Lynch, Director
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Adult & Aging Services
Contra Costa County

Suzanne Shenfil, Director
Human Services Department
City of Fremont

Charlene Silva, Director
Department of Aging and Adult
Services, San Mateo County

Professor Scharlach Appointed to Commission on Aging

Governor Gray Davis recently appointed Professor Andrew Scharlach to the California Commission on Aging.

The California Commission on Aging, an independent agency of the State of California, was created by the Legislature to serve as “the principal advocate body in the state on behalf of older persons.” The Commission is comprised of 25 commissioners: 19 appointed by the Governor and three each appointed by the Speaker of the Assembly and the Senate Rules Committee. The Commission sponsors the activities of the California Senior Legislature and the Triple-A Council of California in addition to carrying out its own advocacy, advisory, and public information responsibilities. ●

Bancroft Fund Provides Grant

The James R. and Jane M. Bancroft Fund has awarded a generous grant to the Center for the Advanced Study of Aging Services in honor of Rose Kleiner to acknowledge her continued work and commitment to improving the quality and appropriateness of services for America’s elderly citizens.

The Bancroft Grant will enable the Center to offer additional doctoral fellowships and masters stipends to attract the best and brightest new minds to the study and practice of gerontological social work. In addition, the gift will enable the Center to continue its research and development activities to improve aging services. ●

Personnel Needs in Aging Services

The Center is currently working on a study of personnel needs in aging services, titled Aging of California’s Baby Boomers: Implications for State Policies, Programs and Personnel. The project is being conducted at the Center in conjunction with the California Policy Research Center.

Staff members have been actively surveying adult and aging services directors and other managers of publicly supported aging services programs in order to gather a descriptive profile of the current aging services workforce and to identify personnel needs in aging services. This information will help to formulate state policies and programs to better meet current and future needs associated with California’s aging population (see Strategic Planning story inside). If you have been surveyed as part of this project we thank you for your response. ●

New Student Staff Member

Jaimie Simon is the most recent Center staff member. She is originally from Portland, Oregon and received her undergraduate degree from the University of Oregon Clark Honors College. Simon is a first-year student in the MSW program where her concentration is gerontology. Before coming to Berkeley, Ms. Simon worked at Oregon Health Sciences University with THINK FIRST, an injury prevention program that offers programs statewide for youth and senior adults.

Ms. Simon is currently working on a comprehensive examination of personnel needs in aging services in California, titled Aging of California’s Baby Boomers: Implications for State Policies, Programs and Personnel (See “Personnel Needs in Aging Services” above). ●

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