



Aging Group Proposal





September 30, 2015

Re: Solicitation for Project Administration Services
Colorado Strategic Action Planning Group on Aging

To Action Planning Group Committee:

Germane Solutions is pleased to submit this proposal to act as your Project Management team with Kris Vilamaa, Director of Health Access, functioning as Project Manager and Casey Hoffman, Manager of Research, operating as Project Assistant to support your group in creating Colorado's strategy for addressing the challenges and opportunities presented by the retirement and aging of the Baby Boom generation.

Kris and Casey are experienced in facilitating strategic committee sessions that result in a cohesive, focused action plan. Our team is equipped to:

-  Conduct research and analyze data
-  Manage contractors
-  Develop effective briefing and communication materials
-  Manage budgets

Both Kris and Casey are familiar with stringent project management, are able to work independently, ensure all deliverables are of high quality and timely and are both former state employees: Kris working in Alabama with state policy formation and oversight; Casey in Missouri as an insurance analyst. Kris's passion for Behavioral Health services and Casey's for services for seniors position us as a team that would best serve your needs.

With Germane, Kris has led significant projects to identify needs and strategic solutions. Kris also previously served as the first Chief Information Officer for the Alabama Department of Mental Health. Kris has managed contractors and budgets for a division that ran six (6) state psychiatric facilities and provided services through contracts to almost one hundred (100) community providers. Kris' passion for behavioral health includes a deep understanding of the critical service needs of seniors.

Casey's expertise is research and data analysis and she has managed statewide assessments for four (4) states including Colorado, South Dakota, Alabama and Arizona. Casey triangulates data



from needs assessments (surveys), provider interviews, key stakeholder interviews, national data and promising evidence-based practices into recommendations for various health care initiatives including aging projects. Casey's love for projects involving aging is evidenced by her deep background in strategic planning for the Cuyahoga County Division of Senior and Adult Services, a Community Assessment and Business Plan to open an Adult Day Care Program in Connecticut and an Operational Assessment for the Area Agency on Aging of South Central Connecticut.

Please review our proposal and feel free to communicate with us on any particulars covered in the following pages.

Sincerely,

A handwritten signature in black ink, appearing to read "Kris Vilamaa".

Kris Vilamaa

Kris Vilamaa, Project Manager
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B. Project Approach

Germane Solutions' awareness of the time, research and preparation required to effectively influence policy formation necessitates a well-managed approach to the research, analysis, policy recommendations and crafting of the message of the Strategic Action Planning Group on Aging. Germane's process would be to **first** perform an environmental scan of the status of aging services in Colorado, The **second** phase would involve input from all Area Agencies on Aging and from other Coloradoans through focus groups and town hall meetings (5 to 6). **Third** Germane suggests the committee explore areas that need to be modified, expanded or eliminated with attention to services, funding and structure. This phase would involve research, benchmarking of Colorado to other states' offerings and analysis of desired practices. This exploration would lead to phase **four**, recommendations to advance the scope and quality of care for seniors with key informant interviews to explore the viability of these recommendations. The final phase would be **five**, a comprehensive strategic plan for aging in Colorado.

1) Environmental Scan

Services

Germane would begin by researching and assisting the Planning Group in the analysis of the current status of services and continuum of care for the aging. This environmental scan will be used as a baseline to pinpoint deficits in services compared to other states' offerings, shifts in services sought by seniors currently and the projected services needed for seniors entering this phase in life.

Advances in health care have prolonged the age of Coloradans, and seniors currently can be viewed in four age cohorts. Each age cohort has differing needs and service requirements and Germane would assist the committee in identifying the population trends and which services are significant.

Age Strata of the Senior (age 55 and over) Population

Age Strata	Health	Attitude	Characteristics
Pre-Senior (age 55 to 60)	Optimal	" I am not old" " I do not need to consider senior services"	<ul style="list-style-type: none"> • Difficult to plan programs • Technologically savvy • Early consideration of financial, legal and health services to optimize care.
Young Senior (age 61 to 70)	Varies	" Do not consider myself old"	<ul style="list-style-type: none"> • Attention to obtaining needed services and optimizing benefits would prevent later difficulties • Technological aptitude varies

Age Strata	Health	Attitude	Characteristics
Middle Senior (age 71 to 89)	Generally some issues have arisen	“ I am older” “ I am entitled to services because I have worked hard and paid my taxes and it is my right”	<ul style="list-style-type: none"> • Technological awareness, but usually not comfortable with technology • Have usually started receiving Social Security and Medicare benefits
Very Old (age 90 and above)	Typically frail	“Proud and does not like to accept help-financially or otherwise” “I can take care of myself.”	<ul style="list-style-type: none"> • Diminished executive functioning • Requires additional staff time & monitoring • Technologically averse • Co-existing health conditions • Loss of family & children as a connection or caregiver • Medical equipment-takes room for transportation. • Lower incomes & medical expenses high

2) Seek input from Area Agencies on Aging and from other Coloradoans

- ✚ Input from Area Agencies on Aging could be obtained through an online survey.
- ✚ Focus groups with target populations (ethnicities, people with dual Medicaid and Medicare funding could be very informative.
- ✚ Town hall meetings at 5 to 6 selected regions could also garner needed input on services and service delivery.

3) Explore areas that need to be modified, expanded or eliminated

This phase would involve research, benchmarking services, service delivery, funding and structure to other regions and a process of forecasting future needs of aging Coloradoans. Suggested states to benchmark would be Oregon, New York and Minnesota.

Services covered in Colorado for Home and Community Based Services are:

Adult Day Health
 Adult Day Social
 Case Management
 Environmental Modification
 Home Delivered Meals
 Homemaker
 Specialized Equipment, Supplies or Assistive Technology
 Transportation



Are these sufficient? Are there other services that might appeal to seniors entering this phase of life? Is each age cohort receiving care in a responsible manner? Has behavioral health care been ignored, and could it be added to a Managed Long Term Support Service program?

Funding.

Sources of funding for Colorado agencies serving seniors are:

✚ State appropriation	✚ Local funding
✚ Foundation / Private grants	✚ Older American Act
✚ Medicaid	✚ U.S. Department of Agriculture
✚ U.S. Department of Labor	

Colorado has a Medicaid Home and Community Based Support 1915(c) Waiver program in place since 2015 but does not currently plan to implement a Medicaid Managed Long Term Support Service program. Colorado's Medicaid Section 1115 Demonstration program for Long Term Support Services other than Medicaid Managed LTSS has been in place since 2014.

Programs under consideration include Medicaid State Plan Personal care Services and 1915(i) and (k) programs:

- ✚ 1915(i): allows states to provide comprehensive LTSS to individuals who do not meet states institutional care level of care criteria
- ✚ 1915(k): Community First Choice option (CFC)

Are these viable alternatives for funding? Should other avenues of funding be explored? How have these funding streams worked for other states?

Colorado participates in a CMS initiative, "Duals Demonstration" that involves a partnership between states and the federal government to align Medicaid and Medicare services, finances and administrative authorities. This demonstration allows states the opportunity to either enter into a joint contract with CMS and private health plans in a fully capitated arrangement or to use a managed fee for service model with integrated care coordination across Medicare and Medicaid and shared savings between CMS and the State.¹ Colorado has an approved plan and has begun implementation. How is this serving Coloradoans?

Structure

Colorado agencies serve between 1,000 and 50,000 seniors annually.

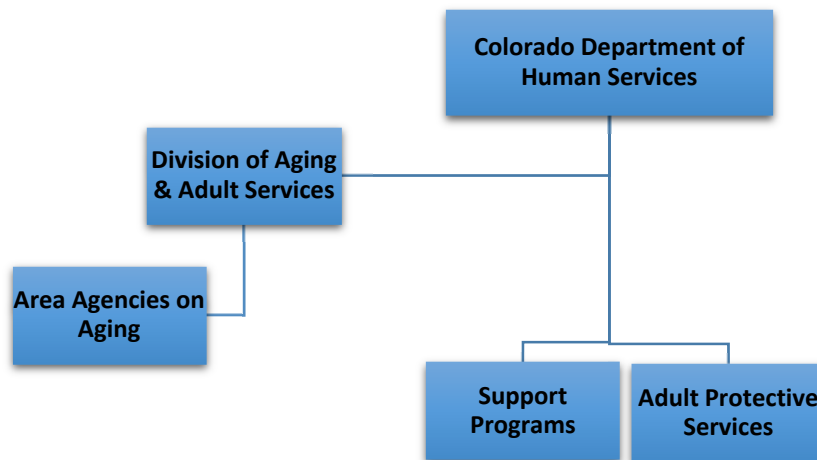
The Older Americans Act

Congress passed the Older Americans Act (OAA) in 1965 (and it was reauthorized in 2015) in response to concern by policymakers about a lack of community social services for older persons. The original legislation established authority for grants to States for community

¹ P. 14, National Association of States United for Aging and Disabilities (NASUAD), "State of the States: 2015 Survey of State Agencies" <http://www.nasuad.org/sites/nasuad/files/NASUAD%202015%20States%20Rpt.pdf>

planning and social services, research and development projects, and personnel training in the field of aging. The law also established the Administration on Aging (AoA), a bureau of the Administration for Community Living, to administer the newly created grant programs and to serve as the Federal focal point on matters concerning older persons.

Currently the OAA is considered to be the major vehicle for the organization and delivery of social and nutrition services to this group and their caregivers. It authorizes a wide array of service programs through a national network of 56 State agencies on aging, 629 area agencies on aging and nearly 20,000 service providers. Colorado's 18 Area Agencies on Aging serve its residents (includes 2 tribal Area Agencies on Aging).



The Colorado Department of Human Services oversees both the Division of Aging & Adult Services that administers OAA funds to local Area Agencies on Aging and also provides Support Programs (Nutrition, Caregiver Support, Senior Community Service Employment (SCSEP) and Supportive Services), and Adult Protective Services, the legal protection for seniors against physical, emotional and financial abuse.

4) Recommendations

This phase would synthesize all the above findings and, with input from key stakeholders (legislators, senior service providers, state department agencies that deliver senior services) would enable the committee to gauge the viability of these recommendations.

5) Comprehensive Strategic Plan for Aging in Colorado

Germane's final report would include a strategic plan for aging services in Colorado, outcome measures and an informed recommendation of the implementation process for this strategic plan to submit to the governor and the legislature. Preparation in crafting the message and in preparing the best possible presentation, both orally and in writing is critical and Germane plans to have preceding phases done early to allow this time.

C. Project Management and Coordination

Deliverable	Deadline	Notes
Contractor Selection	October 12, 2015	
Project Launch	October 15, 2015	
Organize, coordinate and attend meetings of the Planning Group including all support required a) Record minutes of the meeting and all documentation and any other support activities	October 2015 through December 2016	Monthly meetings (2 hours duration)
Ensure collection, analysis and documentation of prior reports relevant to aging in Colorado and elsewhere	October 2015 through November 2016	
Manage and coordinate work of subcontractors	October 2015 through November 2016	
Ensure opportunities for input from Coloradans	October 2015 through November 2016	
Coordinate and manage the work of subcommittees and advisory groups	October 2015 through October 2016	Minimum of four 2-hour meetings monthly.
Coordinate with other state and local agencies and other organizations as appropriate	October 2015 through November 2016	
Analyze appropriate data with Planning Group to create a coherent and comprehensive strategic framework for Colorado.	October 2015 through October 2016	
Prepare an oral report to the Joint Budget Committee during the 2016 Legislative Session summarizing the work of the Planning Group, preliminary findings and recommendations	January 13, 2015 to May 11, 2016 ; First Session; 71 st General Assembly	
Prepare a Strategic Action Plan detailing the work of the Planning Group and its final recommendations	November 1, 2016	
Prepare the group to present the work of the Planning Group and its final recommendations to the Governor, the General Assembly and any affected state agencies	November 30, 2016	
Publications, web placement of articles, etc.	December 31, 2016	



D. Appropriate Subject Matter Experience and Expertise

KRISTOPHER VILAMAA

Director of Health Access

Mr. Vilamaa has over 12 years of behavioral health and information systems experience, with increasing responsibilities culminating in his appointment as the first Chief Information Officer of the Alabama Department of Mental Health (ADMH). Mr. Vilamaa understands the connection between the forces driving healthcare innovation, technology and payment structures. Mr. Vilamaa assists health systems, state and county health and behavioral health agencies in responding to the need to transform the delivery, coordination of care, respond to changing policies impacting service delivery, and to leverage the use of technology to analyze, report, and share data in meaningful ways.

Representative Accomplishments:

- Developed and executed the IT vision and strategy for a large state agency.
- Enhanced ADMH's data and reporting capabilities, including the creation of a data warehouse and implementation of technologies allowing business users more timely access to decision-enabling data.
- Led the development of budgets for a division that ran six (6) state psychiatric facilities and provided services through contracts to almost 100 community providers in Alabama.
- Secured a \$9 million grant for Alabama to implement a statewide initiative to prevent substance abuse.
- Led efforts by the Governor's Office to fund initiatives under the Safe and Drug-Free Schools and Communities Program.

Education:

Kris earned his Bachelor degree of Arts from Purdue University, with an emphasis on math, science and structural design.

Presentations:

- *Understanding Electronic Health Records and the Health Information Exchange*
- Instructor at the Alabama School of Alcohol and Other Drug Studies 2014
- *The Tele-Mental Health Journey*
- Guest Speaker to Alabama Partnership for Telehealth Meeting 2014
- *What Do We Know About Substance Abuse Treatment in Alabama*
- Instructor at the Alabama School of Alcohol and Other Drug Studies 2011

Memberships:

- Member of American College of Healthcare Executives (ACHE) and ACHE Healthcare Consultants Forum
- Member of Alabama State University Health Information Management Oversight Committee
- Past Member of State Refor(u)m User Experience Panel for the National Association of State Health Professionals
- Past Vice President of the Alabama School of Alcohol and Other Drug Studies Board



KATHLEEN (CASEY) HOFFMAN, M.B.A.

Manager of Research

Ms. Hoffman has over 30 years of accounting and information systems experience, with a mixture of corporate finance, personal business, state and healthcare clientele. Ms. Hoffman develops population-level disease profiles, quantifies need with detail by demographic and disease type, and assesses cost at various levels. These levels include cost by severity or acuity, societal cost of not addressing issues or opportunity cost, and cost-effectiveness and benefit assessments. Her efforts in the past two years focus on planning, design, testing and implementation of the Centers for Medicare and Medicaid Innovation Models.

Representative Accomplishments:

- Managed numerous Aging strategic plans including a Community Assessment and Business Plan for the Opening of an Adult Day Care Program in Connecticut, a Strategic Plan for the Division of Senior and Aging Service in Cuyahoga County and an Operational Assessment for the Area Agency for Aging of Southeastern Connecticut.
- Managed the statewide behavioral health needs assessment for the Alabama Department of Mental Health, with approximately 2,000 consumer surveys and over 40 provider interviews.
- Provided Technical Assistance to the Colorado Department of Human Services (DHS) and the Colorado Department of Health Care Policy & Financing (HCPF) on cost allocation methodology for all health and social service programs including Medicaid/TANF, SNAP, CHIP and WIC.
- Supervised and conducted the latest statewide Ryan White Needs Assessment for the Ohio Department of Health and the State of Arizona.
- Conducted cross-tabulations and tests of statistical significance on large databases for over 50 clients throughout the United States at the City and County levels.
- Created pivot tables and macros to speed analysis of health care surveys and subsequent reporting of target populations and special populations (demographic, disease transmission, severity or acuity level, age group).

Education

Casey earned her Bachelor degree of Science from the University of Dayton, Ohio and Master degree of Business Administration from the New Jersey Institute of Technology. At NJIT, her concentration was in advanced information technology with focus in analytic skills including expertise in ACCESS, SQL, and Statistical Process Control software. She is currently sitting for the Certificate of Public Accounting (CPA) examination.

Memberships:

- Member of NJIT's Alpha Epsilon Lambda (AEL) Honor Society, Member of Beta Gamma Sigma National AACSB (American Association of Certified Business Schools) Honor Society



Areas of Subject Matter, Experience and Expertise relevant to Project:

Kris Vilamaa, Project Manager:

Policy Development
Strategic Planning
Budgeting
Medicaid expertise
Behavioral Health expertise
Presentations to State Legislature
State Level Behavioral Health, Policy & I.T.
Experience

Casey Hoffman, Project Assistant:

Aging Initiatives
Strategic Planning
Budgeting
Focus Group Facilitation, Town Hall
Meetings
Research & Data Analysis
State Level Insurance Expertise

E. Budget

Line Item	Hours		Rate	
	Project Manager	Project Assistant	\$160 Project Manager	\$100 Project Assistant
Meetings	75	75	\$12,000	\$7,500
Research	100	80	\$16,000	\$8,000
Reporting	90	60	\$14,400	\$6,000
Focus Groups, Key Informant Interviews, Town Hall Meetings	25	50	\$4,000	\$5,000
Professional Fees			\$0	\$0
Production of Reports	60		\$9,600	\$0
Fulfillment of Duties		45		\$7,000
Total Hours	335	310		
Total Dollars			\$56,000	\$33,500
				\$89,500



F. References

CLIENT	PROJECT	CONTACT
TEAM, Inc. Lower Naugatuck Valley, CT June- July 2015	Community Assessment and Business Plan to open an Adult Day Care program in the Lower Naugatuck Valley of Connecticut. Included external and internal needs assessments, focus groups, key informant interviews with legislators, Connecticut State Department executives and executives of existing adult day care programs	Diane Stroman, Executive Vice President TEAM, Inc. 30 Elizabeth St. Derby, CT 06418 dstroman@teaminc.org 203-736-5420 ext. 234
Area Agency on Aging of South Central Connecticut New Haven, CT March 5-31, 2014	Quality Improvement Review Assessed existing quality improvement process and developed quality improvement plan through mock audit, review of state agency's audit results and time motion study of incoming calls to Case Managers.	Beverly Kidder, Director Area Agency on Aging of South Central Connecticut 1 Long Wharf Dr. New Haven, CT 06511 (203)785-8533 bkidder@aoascc.org
Cuyahoga County Division of Senior and Adult Services (DSAS) Cleveland, OH Aug 2013-Jan 2014	Strategic Plan Development Assisted in the development of a three-year Strategic Plan for a county agency serving the elderly and disabled through needs assessments, focus groups, SWOC analysis, revision of Mission and Vision statements, Performance Measurement metrics and monitoring tools.	Sylvia Pla-Raith, Chief Supervisor Adult Protective Services Cuyahoga County 13815 Kinsman Road Cleveland, OH 44120 (216) 420-6755 sylvia.pla-raith@ifs.state.oh.us

G. Conflict of Interest

Germane Solutions confirms that neither Kris Vilamaa, Casey Hoffman, Germane nor any potential sub-consultants have any conflict of interest with this strategic planning group.