



Training Course

The Art of Options Counseling

Training for ADRC staff who support individuals and families in decision-making



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The Art of Options Counseling

Overview of Course



- ◆ Welcome & Introduction
- ◆ Course Purpose & Format
- ◆ Learning Objectives
- ◆ Module I: What is Options Counseling?
- ◆ Module II: Core Competencies of Options Counseling
- ◆ Module III: A Family Profile
- ◆ Course Evaluation & Post-test



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The Art of Options Counseling

Learning Objectives

- ◆ Have a working understanding of the definition of Options Counseling (OC) and how it is different from information, referral and assistance
- ◆ Understand the components and core competencies of OC
- ◆ Learn how to identify consumers in need of decision support and what level of support is needed
- ◆ Learn strategies to respect self determination while supporting informed decision-making



The Art of Options Counseling

Course Purpose and Format

- ◆ **Module I - What is Options Counseling?**
 - Understanding the value of OC for our consumers
 - Defining OC
- ◆ **Module II - Core Competencies of Options Counseling**
 - Skill sets needed by Options Counselors
- ◆ **Module III - A Family Profile**



Module I: What is Options Counseling?

Module I - What is Options Counseling?

- ◆ Understanding the value of OC for our consumers
- ◆ Defining OC



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Module I: What is Options Counseling?

Sound familiar?

"So every decision we made - residential, medical, financial - was a crapshoot that changed the landscape for the next decision, usually by limiting options I didn't even realize we had."

- Jane Gross, New York Times
July 7, 2008



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Module I: What is Options Counseling?

Value of Options Counseling

- ◆ Institutional placements often occur without consideration of available community-based options
- ◆ Lots of information is available on-line, but it can be complex, contradictory, and confusing
- ◆ Families need individualized support making decisions about long-term care
- ◆ Few people plan ahead for long term support needs



Module I: What is Options Counseling?

Defining OC

Long-Term Support Options Counseling is an interactive decision-support process whereby consumers, family members and/or significant others are supported in their deliberations to determine appropriate long-term support choices in the context of the consumer's needs, preferences, values, and individual circumstances.

Options Counseling is the "value-added" for ADRCs



Module I: What is Options Counseling?

Decision Support



INFORMATION +



EDUCATION +



PERSONAL
EXPERIENCE

= KNOWLEDGE



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Module I: What is Options Counseling?

Building Blocks for Decision Support

- ◆ Firm foundation in quality information and referral/assistance
 - Many ADRCs requiring AIRS certification
- ◆ Lessons to be learned from the disability community
 - Person-centered planning
 - Peer counseling
- ◆ Tools to assist families in decision making
 - Exploring choices together on paper
 - Action steps outlined for family
- ◆ Learning through practice and experience
 - Can't learn "art" from a text book
 - Decision support in difficult situations and complex family dynamics



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Module I: What is Options Counseling?

How do you know when options counseling is occurring?

- ◆ Many grantees report that OC takes more time than traditional information and assistance services, e.g., average call times increase
- ◆ In-person visits shown to be more effective than phone—and include family members
- ◆ Documentation shows high level of decision support
- ◆ Standards emerge for your organization
 - Wisconsin's Long-Term Care Options Counseling Tool-Kit
 - Indiana's standard operating procedures



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Module I: What is Options Counseling?

Where does options counseling occur?

- ◆ In person (face-to-face)
- ◆ Home visit
- ◆ Over the phone
- ◆ Online



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Module I: What is Options Counseling?

When does options counseling occur?

Situations

- ◆ When an individual has immediate or short range long-term care needs
- ◆ When a family caregiver needs help to continue providing care
- ◆ When a long distance caregiver has concerns about the increased frailty or care needs of a loved one
- ◆ When an child with a disability is transitioning from a school-based system to the adult service system

System flow

- ◆ During provision of I&R
- ◆ During SHIP counseling
- ◆ During an assessment of need
- ◆ When applying for publicly funded benefits
- ◆ While waiting on application to be processed
- ◆ After applying unsuccessfully for public programs
- ◆ After admission to a long-term care facility
- ◆ As part of nursing facility transition



Module I: What is Options Counseling?

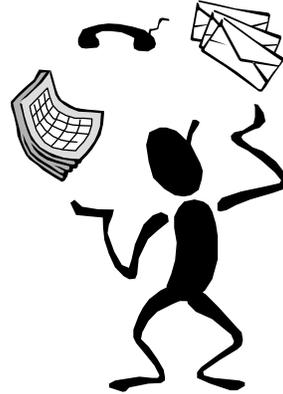
Questions?

To ask a question please listen to the verbal instructions from the operator or type your question into the GoToMeeting 'Question and Answer' function



Module II: Core Competencies of Options Counseling

Skill Sets Needed by Options Counselors



Module II: Core Competencies of Options Counseling

Six core competencies of options counseling

1. Determine the need for OC
2. Assess needs, values and preferences
3. Understand public and private sector resources
4. Demonstrate respect for self-direction / determination
5. Encourage future orientation
6. Follow-up



ACTIVE LISTENING SKILLS

Module II: Core Competencies of Options Counseling

Core Competency #1: Determine the need for OC



- ◆ During the initial contact with the ADRC, staff determine if OC is appropriate.
- ◆ Assess the purpose of the contact by asking such questions as:
 - What kind of help are you looking for?
 - How do you describe the underlying problem?
 - Would you like support making these difficult choices?



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Module II: Core Competencies of Options Counseling

Core Competency #1: Determine the need for OC



Example Cues from Consumers

- “Maybe I...”
- “I’m not sure...”
- “Where do I...”
- “I don’t know...”
- “I can’t...”
- “Someone told me I need...”



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Module II: Core Competencies of Options Counseling

Core Competency #2: Assess needs, values, and preferences

- ◆ If decision support is requested, find out about..
 - Demographics (name, address, phone number, age)
 - Physical and/or mental needs
 - Support System (family, friends, neighbors, etc.)
 - What is important to the individual?

- ◆ Decide how you will gather additional information and begin to form relationship with individual and family
 - Introductory phone call
 - Home visit
 - You may have to “dose” information and support



Module II: Core Competencies of Options Counseling

Core Competency #3: Understand public and private sector resources

- ◆ Staff must have working knowledge about resources beyond public programs (e.g. private services, community resources)

- ◆ Options counselors must be prepared for situations in which there does not seem to be a resource to meet the needs expressed

“Just because you don’t link someone with a service, does not mean you have not done them a service”



Module II: Core Competencies of Options Counseling

Understand public and private sector resources, *(continued)*

Conduct outreach to organizations and agencies identified above:

- ◆ Initiate potential partnerships with them

- ◆ Add their offerings to your agency's database, for example:
 - Financial planners
 - Elder law
 - Transportation services
 - In-home services



Module II: Core Competencies of Options Counseling

Core Competency #4: Demonstrate respect for self-direction / determination



Module II: Core Competencies of Options Counseling

Core Competency #5: Encourage future orientation

- ◆ Look beyond immediate needs by helping consumers to proactively consider future possibilities, and outcomes of decisions
- ◆ Reach out to family caregivers (especially adult children) in helping them anticipate and plan their future needs



Module II: Core Competencies of Options Counseling

Core Competency #6: Follow-up



Follow-up serves a critical role in assessing the usefulness of services as well as strengthening the consumer's relationship with the ADRC.

Module II: Core Competencies of Options Counseling

Active Listening Techniques and Practices

- ◆ Paraphrase, reflect and ask open and closed-ended questions
- ◆ Articulate, clarify and challenge assumptions
- ◆ Understand that people may not know what they want or need
- ◆ Take time to listen
- ◆ Evaluate pros and cons



Module II: Core Competencies of Options Counseling

Key Questions to Ask

| | Yourself | Consumer/Family |
|-----------|--|---|
| Feelings | What bias do I bring? Do I have a strong opinion about what they should do? | Where are they in their ability or willingness to make a decision? Are they anxious or laid back? |
| Knowledge | Do I have a handle on all of the potential resources in the community that may be useful to this family? Who else should I consult for ideas? | What information have they received already? How much information can they handle right now? What do they see as options? |
| Skills | What clinical skills are most important in this situation? (empathy, creativity, motivational interviewing) | What strategies have they already tried? How likely are they to follow-up after discussions? |

Module II: Core Competencies of Options Counseling

Questions?

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Module III: Family Profile



Example drawn from Wisconsin Options Counseling Toolkit available at www.adrc-tae.org

Module III: Family Profile

- ◆ What are the central issues described in the scenario?
- ◆ What key questions would you ask?
- ◆ Discuss resources and approaches to sharing resource information that may be helpful for the consumer, and
- ◆ Discuss what communication skills are most helpful in this scenario and why



Module III: Family Profile

Millicent Family

- ◆ Harold, a 78 year old who has shown signs of memory loss and repetition, has been diagnosed with dementia. His wife Marjorie, 76, has become frustrated at Harold's repetition and lack of personal care and fears his sometimes aggressive behavior. Harold has also lost a great deal of weight.
- ◆ Marjorie thinks she cannot have him at home any longer, but is concerned about the financial implication of outside placement.
- ◆ Family members are concerned about Marjorie becoming overwhelmed with the stress of caregiving.



Module III: Family Profile

Millicent Family

Key Issues

- ◆ Harold's weight loss and aggressive behaviors
- ◆ Education/support on dementia
- ◆ Caregiver support
- ◆ Financial/legal concerns
- ◆ Housing options

What questions would you ask?



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Module III: Family Profile

Questions?

To ask a question please listen to the verbal instructions from the operator or type your question into the GoToMeeting 'Question and Answer' function



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Our job is to give people the tools they need to choose the right path for themselves...



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Post-Test and Course Evaluation

To take exam for CEU credit, go to

<http://www.adrc-tae.org/tiki-index.php?page=OptionsCounselingTraining>

