# Long-Term Care Planning Grants – Quarterly Report

Department of Health and Family Services – Division of Disability and Elder Services

**Reporting Period:** This report documents activities performed by planning groups for the grant period February 1, 2006 through June 30, 2006.

**Reporting Requirement:** Complete your report as a Microsoft Word document using the format below and submit it as an email attachment to Kathleen Luedtke, Comprehensive Systems Change Manager at the following address: luedtka@dhfs.state.wi.us. All fields in the report template must be completed. Reports will be posted on the Managed Long-Term Care Expansion website at http://dhfs.wisconsin.gov/ManagedLTC/. Reports should not exceed 3 pages, excluding attachments. **This report is due no later than August 15, 2006.**

## Section 1 – Identifying Information

Planning Group Name:

Name/Address/Contact Information for person completing this report:

Grant Award Amount:

Amount of Grant Award Expended (regardless of whether you have reported this amount on CARS) and Description of Expenses:

Amount and Description of Contracts Awarded with Grant Funds:

Planning Partners: Identify any changes in membership of your planning group since the grant award (partners, including counties, that have joined or discontinued their affiliation with your planning group). Identify any potential new members, including counties, with whom your planning group has discussed affiliation and describe the extent of that discussion.

## Section 2 – Strategic Planning for System Change

Describe your approach and your progress to strategically plan for managed long-term care program development and implementation. Identify and describe the involvement of paid or unpaid facilitators that are guiding your process. Detail any mission, principles, goals, objectives, milestones and workgroups that your planning group has established. Report the membership of planning councils and workgroups (name and affiliation), meeting schedule (weekly, monthly, etc.). For planning councils, describe the procedural and decision-making model used by the council. For workgroups, describe the scope of work, tasks and outcomes anticipated from each. If your planning group has hired a project manager, list the responsibilities of that individual and the skills he or she brings to your planning efforts.

## Section 3 – Program Development

Describe your progress toward identifying a program model that will be the focus of your planning efforts. List the pros and cons of program models **for your planning partners** that your planning group identified in the course of your deliberations. Describe the initial progress your planning group has made in the areas identified in your Grant Agreement, Section 4:

a. Implementation and Management Plan for Care Management Provision
b. Provider Network Development
c. Administrative and Financial Systems
d. Information Technology and Reporting Systems
e. Consumer and Stakeholder Participation (Report information not included in stakeholder involvement correspondence that was due June 15, 2006.)
f. Quality Management Systems
g. Eligibility and Enrollment Systems
h. Establishment of Risk Reserve and Business Solvency Plan
i. Coordination or Integration with Acute and Primary Health Care
j. Legal and Operational Platform for Regionalized Governance
k. Coordination with Adult Protective Services and Statutory Requirements
l. Conversion of Present Waiver Caseload and Waiting Lists
m. Involvement with UW-Extension LTC Planning and Stakeholder Project

## Section 4 – Aging and Disability Resource Center (ADRC) Planning

Describe involvement of your planning group in activities to achieve readiness for an operational ADRC within the counties or geographic area that is the focus of your planning.

## Section 5 – Major Milestones

Describe major milestones achieved by your planning group during this reporting period. Achievement may be in many areas: communication, group process, strategic planning, consensus on plans or issues, formation of business partnerships or governance structures, etc. Summarize the progress that your planning group has made, overall, toward planning for expansion of managed long-term care. Identify any significant deviation from the planning timeline that was included in your grant proposal.

## Section 6 – Challenges

Describe challenges faced by your group as it proceeds through planning activities. Identify information, technical assistance or support that would assist your group to achieve its planning activities.