

## *Case Study Example*

# Choosing an Evidence-Based Program for **Eldercare Services Institute** of Benjamin Rose Institute on Aging

David M. Bass

Senior Vice President and Senior Scientist

Benjamin Rose Institute on Aging

# Benjamin Rose Strategic Planning Goal

**Eldercare Services Institute** is a long-time provider of an array of home and community services for older adults in Cuyahoga County, Ohio

- Adult Day Services
- Mental Health Program
- Home Health Program
- Social Work Case Management
- Senior Companion Program

Goal to expand **Eldercare Services Institute's** programs for family caregivers

## Challenging to Find the Right Program

***Families Caring for an Aging America*** (2016) the “lack of knowledge of providers, health and social service organizations, and administrators of available evidence-based programs” is a major challenge in “moving evidence-based interventions from the research phase to implementation in health and social service settings” (Schulz & Eden, p. 178).

# Many Advances in Caregiving Support – But Hard to Compare

No single comprehensive information source

Published research articles - limited information describing programs, manuals, training, delivery tools & delivery experiences

Difficult to know which programs:

- Best match an organization or community context
- Are ready and available for community delivery
- Whether they worked well in other communities
- How to get permission and tools to deliver

# Coming Soon! *Online Resource for Comparing Evidence-Based Dementia Caregiving Programs*

Collaboration: Benjamin Rose Institute on Aging and Family Caregiver Alliance

Funders: The John A. Hartford Found., Archstone Found., Retirement Research Foundation

- Comprehensive program profiles
- Basics about the research
- Detailed information about implementation features
- Detailed experiences of existing delivery sites
- Designed for health and social service organizations, providers, and funders

# Eldercare Services Institute Program Choice

## Selected **BRI Care Consultation™**

Based on assessment of 5 factors:

- Program Characteristics
- Staffing and Training Compatibility
- Intra-organizational Compatibility
- Marketing and Financial Viability
- Community Characteristics





# Key Components

## Assessment

*to help families identify problems*

## Action Plan

*to move toward solutions*

## Ongoing Support

*as care situation change*



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# Positive: Program Characteristics – Aligned with Benjamin Rose Mission

Benjamin Rose researchers led development – owned by Benjamin Rose

- Strong outcomes
- Demonstrated success and sustainability by licensed sites
- Showcases research/practice partnership

Holistic, care-coaching program – Individual, family, community

Assists person with illness/disability and caregivers

Consumer-driven, supports family preferences; Long-term relationship

Reaches large numbers of families at low cost - national market, potential payment sources



# Positive: Program Characteristics – Types of Assistance

Links to health and community services - resolves barriers to service use

Promotes family and friend involvement in care

Offers coaching and emotional support

Provides quality information

Responds to changing needs

Standardized protocol with personalized content

# Positive: Program Characteristics – Quality Delivery Tools

Evidence-based delivery protocol

Fully manualized

Customized software for program delivery

Initial and ongoing training

Variety of reporting features

Guidelines for staffing

Enrollment/Marketing tools

# Negative: Program Characteristics

Required use of customized software

More difficult to deliver than time-limited caregiver education or training programs

More costly to deliver because of staffing requirements

# Positive: Staffing and Training Characteristics

Workforce with similar qualifications as other employees

- Bachelor or masters degree in SW, RN, other helping profession
- Experience with ill or disabled older adults and/or caregivers
- Potential for reassigning existing staff
- Familiar pool of potential staff

Refined training protocol from experiences with licensed sites

Training for supervisors, as well as Care Consultants

Training delivered online and/or in-person

# Negative: Staffing and Training Characteristics

Focus on caregivers is new

No in-home or in-person contacts

Operationalizing a “consumer driven” approach (not case management)

High caseloads; 1 FTE for 100-125 families

Requires a significant staff member time-commitment to be proficient

# Positive: Intra-Organizational Characteristics

New emphasis on caregiver support promoted by Strategic Plan

High-level program champion

High-level administrative support to expand services to caregivers

BRI Care Consultation familiar to staff and Board

Master trainers known and liked by service staff

Different enough from other Eldercare services to be unique

- Telephone and email delivery
- National market
- Evidence-based



# Negative: Intra-Organizational Characteristics

Change is hard – entire organization has to adjustment

- Financial Issues – Amount and length of internal funding; Space, equipment, supplies, and IT requirements; Adding or replacing existing costs; External revenue streams
- Educating all staff and Board – Rationale for this program; Differences from existing programs; Target populations;
- Human Resource issues – New job descriptions and postings; Reassignment of existing staff or new hires
- Institute advancement issues – New marketing materials and strategies

# Positive: Marketing and Financial Viability

Growing societal concern about family caregivers

Enhance Benjamin Rose's reputation as developer and deliverer of evidence-based programs

Experiences of licensed sites as a starting point for creating a plan

Large "National", rather than a small "local" market

Not limited to certain subgroups of caregivers – dementia, adult children

Several possible revenue streams – Title IID; employers; self-pay; health systems

- Two major contracts signed

# Negative: Marketing and Financial Viability

Not covered by Medicare or Medicaid

National market requires different marketing plan and materials

Limited demand from existing Eldercare Services clients

No reliable information on number of caregivers who will use the program

No established business plan or pricing structure

## Positive: Community Characteristics

Not competing with local provider organizations – national market

Not limited by geography

Adaptable for many different populations or groups – Veterans,  
Rural areas, Selected diseases

# Negative: Community Characteristics

Do not want to compete with our licensed sites

Not reimbursed by Medicare or Medicaid