

DRAFT

2011 Aging and Disability Resource Center Readiness Review Checklist

<i>ADRC Review Criteria</i>		Achieved	Partially Achieved	Not Achieved
1.0	<i>Organization and Governance</i>			
1.1	<i>The AAA's leadership is involved in decisions regarding the transition of the ARC to an ADRC.</i>			
1.1.1	The AAA's leadership has identified the target disability group to be served by the ADRC. <i>Review documentation of contact with disability organizations serving the identified target population.</i> Comments:			
1.1.2	Minutes and other documentation reflect the active involvement of the Board of Directors and its oversight of the AAA's transition process. <i>Review <u>board minutes</u> reflecting ADRC discussion and interview board members. (See Attachment 1- board interview questions).</i> Comments:			
1.2	<i>The local coalition work group has been expanded to include disability representatives and is functioning in an advisory capacity to the ADRC.</i>			
1.2.1	The local coalition work group includes individuals with disabilities and/or their representatives. <i>Review <u>local coalition work group meeting minutes/summaries and rosters.</u></i> Comments:			
1.2.2	Minutes, correspondence and other documentation reflect the coalition work group's participation in an advisory capacity to the ADRC. <i>Review <u>local coalition work group meeting minutes/summaries and rosters.</u></i> Comments:			
1.3	<i>The ADRC has established appropriate linkages with the disabilities community.</i>			
1.3.1	The ADRC has executed a Memorandum of Understanding (MOU) with the appropriate state disability agency's local office for collaboration. <i>Review <u>draft memorandum of understanding.</u></i> Comments:			
1.3.1.1	The MOU outlines the staff functions and responsibilities for providing ADRC services to persons with disabilities and related procedures for documenting flow of work. <i>Review <u>draft memorandum of understanding and related documentation.</u></i> Comments:			
1.3.2	The ADRC has executed a written referral agreement with one or more community disability provider(s) in the planning and service area. <i>Review <u>draft referral agreements and documentation of communication (such as meeting minutes, agendas, conference calls, emails) with partners to develop local agreements and protocols.</u></i> Comments:			

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1.3.2.1	The ADRC referral agreement establishes local protocols for providing and documenting the provision of information and referral services to persons with disabilities. <i>Review <u>draft referral agreements and documentation of communication</u> (such as meeting minutes, agendas, conference calls, emails) with partners to develop local protocols for documenting services to persons with disabilities.</i> Comments:			
1.3.3	Interviews with local state agency staff confirm their understanding of and commitment to fulfilling their responsibilities as outlined in the MOU. <i>Interview <u>local state agency staff</u>. (See Attachment 2 for interview questions.)</i> Comments:			
1.4	<i>There is evidence of ADRC consultation with disability community organizations and volunteer associations to expand the number of access points.</i>			
1.4.1	The ADRC has developed written referral agreements and protocols with disability community organizations and volunteer associations in the planning and service area to serve as ADRC access points. <i>Review <u>draft referral agreements and documentation of communication with other organizations and associations, etc. regarding their role with the ADRC</u>.</i> Comments:			
1.4.2	Interviews with representatives of disability community organizations and volunteer associations confirm their understanding of and commitment to fulfilling their responsibilities as outlined in the referral agreement. <i>Interview <u>a sample of representatives from disability community organizations and volunteer associations</u>. (See Attachment 3 for interview questions.)</i> Comments:			
2.0	<i>Service Delivery Capacity</i>			
2.1	<i>The ADRC demonstrates the capacity to serve the entire planning and service area.</i>			
2.1.1	All ADRC functions are available to every county in the planning and service area. <i>Review <u>draft referral agreements and documentation of communication</u> (such as meeting minutes, agendas, conference calls, emails) with partners to develop local agreements and protocols.</i> Comments:			
2.1.2	The information and referral system's database has been expanded to include both public and private disability resources. <i>Review <u>database for disability resources</u>.</i> Comments:			
2.2	<i>The ADRC demonstrates the ability to serve customers with special needs.</i>			
2.2.1	The ADRC is attempting to address the needs of adults with disabilities and of community resources that serve them. <i>Review <u>documentation of communications</u> (such as meeting minutes, agendas, conference calls, emails and trainings) with partners.</i> Comments:			

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2.2.2	The ADRC provides barrier free physical access to its services for persons with disabilities at its main location and satellite office(s). <i>Review <u>ADRC operational policies and procedures/protocols</u> and <u>observe area(s) to determine compliance</u>.</i> Comments:			
2.2.3	The ADRC has established a mechanism to track inquiries from individuals with disabilities. <i>Review <u>Refer caller/contact module</u> to view marker for tracking contacts by or on behalf of individuals with disabilities.</i> Comments:			
2.3	<i>The ADRC has an outreach and marketing plan that promotes the ADRC as a highly visible and trusted place for unbiased information and referral.</i>			
2.3.1	The outreach and marketing plan includes strategies to educate the community about the ADRC as the source of information on the full range of long-term supports and service options. <i>Review <u>ADRC outreach and marketing plan</u>.</i> Comments:			
3.0	<i>Personnel and Staffing</i>			
3.1	<i>The ADRC has assigned key staff as ADRC liaisons with disability organizations.</i>			
3.1.1	The ADRC has designated staff to serve as key point(s) of contact with disability partners. <i>Review <u>ADRC position descriptions</u>.</i> Comments:			
4.0	<i>Training</i>			
4.1	<i>ADRC is in partnering with the disability community to provide cross-training on aging and disability issues.</i>			
4.1.1	The ADRC's training plan includes training on understanding the needs of the disability population(s) served. <i>Review <u>ADRC Training Plan</u>.</i> Comments:			
4.1.2	ADRC designated staff has participated in training using the approved ADRC curriculum if partnering with developmental disabilities. <i>Review <u>sign in sheets, agendas, and training material to document use of curriculum</u>.</i> Comments:			
4.1.3	The ADRC conducts local training events for ADRC staff and community partners, including topics such as information and referral, intake and screening, memoranda of understanding, referral agreements and protocols. <i>Review <u>ADRC training documentation (agendas, sign-in sheets, evaluation forms, handouts)</u>.</i> Comments:			
4.1.4	ADRC staff has received training from local state disability staff and			

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	community providers relative to the disability service system and community resources for adults with disabilities. <i>Review <u>personnel files or other material</u> that documents staff has attended training.</i> <i>Comments:</i>			
5.0	<i>Consumer Satisfaction</i>			
5.1	<i>The ADRC has established criteria to assure customer satisfaction.</i>			
5.1.1	The ADRC collects data to determine the degree of consumer satisfaction with functions performed by the ADRC. Representatives of the disability population are included in the customer satisfaction surveys. <i>Review <u>ADRC consumer satisfaction survey results.</u></i> <i>Comments:</i>			
5.1.2	The ADRC analyzes the consumer satisfaction survey results and uses the data to address problems that are identified. <i>Review <u>ADRC documentation of how the results are used to improve service.</u></i> <i>Comments:</i>			

ADRC Readiness Review Checklist

Board Interview Questions (Item 1.1.2)

1. What is your understanding of the transition from an ARC to an ADRC project?
2. To what degree do you feel your fellow board members understand the transition from an ARC to an ADRC project (i.e., limited, good, excellent)? Please elaborate.
3. What was your role in identifying the target disability population? Please elaborate.
4. Do you feel other board members have sufficient understanding of the ADRC requirements on the AAA and disability provider network? Please elaborate.
5. What has been the extent of the board's involvement in the ADRC transition project? Please elaborate.

ADRC Readiness Review Checklist

Appropriate Local State Agency Interview Questions (Item 1.4.2)

1. What is your understanding of your role in the ADRC?
2. Are you familiar with the requirements of the Memorandum of Understanding?
3. How have you addressed the following issues?
 - Training
 - Resource Development
4. How have you worked together to develop necessary protocols?
5. How are you working together to address challenges?

ADRC Readiness Review Checklist

Interview Questions for Disability Community Organizations and Volunteer Associations (Item 1.4.2)

1. What is your understanding of your role in the ADRC?
2. Are you familiar with the requirements of the referral agreement?
3. How have you worked together to develop necessary protocols?
4. Have you worked together in identifying resources? Please elaborate.
5. How are you working together to address challenges?