AGING Life CARE® ASSOCIATION

The experts in aging well.

Recommendations For Academic Communities Developing Aging Life Care™ Programs

INTRODUCTION

With the explosive growth in the aging population, there has been an unprecedented demand for Aging Life Care/care management services across the life span. This has led to an urgent necessity for workforce development in the Aging Life Care/care management field in order to support aging communities in promoting health, wellness, and optimal aging.

The Aging Life Care Association® (ALCA) believes that there should be a uniform set of core competencies and standards that serve as a foundation for practice excellence. These competencies and standards should be communicated to academic communities developing curricula in Aging Life Care/care management. To this end, ALCA seeks to develop and sustain an academic and experiential practice infrastructure that produces a highly competent workforce who can meet the growing demands for Aging Life Care services in our communities.

In 2012, the former National Association of Professional Geriatric Care Managers (NAPGCM), which is now known as the Aging Life Care Association (ALCA), examined, adapted, and added to a number of core competencies developed by the Partnership in Aging (PHA). The PHA is an academic branch of the American Geriatrics Society tasked with establishing core competencies in the care of older adults that are relevant to, and can be endorsed by, all health professional disciplines.

With the continued growth and development of the Aging Life Care/care management service industry, ALCA's Education Committee in 2016 sought to revise, edit, and further update these core competencies to reflect the changes and growth in this service arena.

ALCA has achieved national recognition as a thought leader in the care management field and has long been an advocate for promoting the highest practice standards of excellence and ethics. As Experts in Aging Well™, ALCA has articulated Eight Core Knowledge Areas of Expertise essential for effective care management practice: crisis intervention, health and disability, financial, housing, family, local resources, advocacy, and legal. The goal of the Education Committee was to incorporate these practice tenets while strengthening the existing core set of guidelines that are being sought after by the myriad of academic communities that are offering, developing, or upgrading Aging Life Care programs.

Our hope is that these knowledge areas will become the basis of competency assessment and information building in academic, clinical, and mentorship programs both nationally and globally that serve to educate future professionals in this dynamic field. The committee has revised, merged and updated the existing nine multidisciplinary domains developed by PHA and NAPGCM in 2012 and added advances in knowledge in existing and new domains including business, technology, leadership, ethics and standards, mental health, legal, benefits, and housing.

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1 DOMAIN 1 | Health Promotion, Education, and Safety

1. Advocate to clients* and/or client systems interventions and behaviors that promote physical, cognitive, mental health, nutritional, functional, safety, and social interactions, while incorporating autonomy, choice, independence, and quality of life.

2. Identify and inform clients and/or client systems about evidence-based approaches to screening, immunizations, health promotion, and disease prevention. Maintain current knowledge of advancements in pharmacology and medical care, including procedures, interventions, technology, equipment, and trends in public and behavioral health.

3. Assess all risks and barriers to client well-being; promote harm-reduction and client safety, recognizing any indicators of elder abuse or signs of abuse to person(s) with disability, including mistreatment, neglect, self-harm, exploitation, and any other risks involving the community, home, or care environments.

4. Educate the client and/or client system regarding effective medication management principles, including safe, appropriate, and effective medication management practices. Utilize and be familiar with medication management systems and teaching tools that assist with the safe use of medication.

5. Apply knowledge on the indications and contraindications for, and the risks and alternatives to, the use of physical and pharmacological restraints used with clients and always advocate for the least restrictive options.

**Client means individual in need of service. May be older adult or person with disability. Client system means all others affected by or having an impact on the client's care agencies; third party with needs and may include: primary client; family member in/out of household; paid caregiver, friends, neighbors or community agencies; third party with fiduciary responsibilities; other professionals; the Aging Life Care Professional®.*

2 DOMAIN 2 | Evaluation and Assessment

1. Define the purpose and components of an interdisciplinary, comprehensive Aging Life Care™/ care management assessment and the roles individual disciplines play in conducting and interpreting a comprehensive assessment.

2. Understand ALCA's Eight Core Knowledge Areas, which include crisis intervention, health and disability, financial, housing, family, local resources, advocacy, and legal. Be able to apply these fields of expertise to the biological, physical, cognitive, psychological, behavioral and social changes commonly associated with healthy aging and wellness in addition to chronic care and aging disability.

3. Investigate, choose, administer, and interpret a validated and reliable assessment tool/instrument appropriate for: a) cognition, b) mood, c) physical function, d) nutrition, and e) pain.

4. Demonstrate knowledge of the indicators of mild cognitive impairment or deep forgetfulness and be able to differentiate between delirium, dementia, and depression. Demonstrate the ability to recognize the signs, behaviors, and symptoms related to a change in daily functioning so as to initiate appropriate evaluation and care by medical providers.

5. Develop verbal and nonverbal communication skills and strategies to overcome potential physical, sensory, language/verbal, and cognitive limitations in clients.

3 Domain 3 | Care Planning and Coordination across the Care Spectrum and Life Span

1. Develop care plans based on best practices using evidence-based care towards person-directed care goals. Plans should be modified according to clients' preferences, treatment/care goals, life expectancy, co-morbidity conditions, and/or functional and mobility status.

2. Educate clients and client systems on advanced directive planning and be familiar with tools that include the designation of health agents, MOLST/ POLST forms, and at-home/in-hospital DNR/DNI forms. Develop end-of-life care plans based on clients' preferences and treatment/care goals, and their physical, psychological, social, and spiritual needs. Be aware of the portability issues when using health care proxies and advanced directives across different states or out of the country so as to assist with proper care planning that honors the dignity of the individual.

3. Recognize the need for continuity of care with consistent, adequate treatment and communication across the spectrum of services and during transitions between care settings. Be able to utilize information technology where appropriate and available.

4. Distinguish among, refer to, and/or consult with any of the multiple health care professionals, paraprofessionals, and care partners who work on the team on behalf of clients to achieve positive outcomes.

5. Communicate and collaborate with clients and their support systems to incorporate discipline-specific information into overall team care planning and implementation.

4 Domain 4 | Client System Support

1. Assess client system knowledge and expectations on the impact of aging and address acute or chronic disease processes. Communicate to and advocate with the client system for care planning that incorporates ALCA's Eight Core Knowledge Areas — crisis intervention, health and disability, financial, housing, family, local resources, advocacy, and legal — so as to address the client's unique health risks, needs, manifestations, and treatment of health conditions.

2. Assist the client system to identify, access, and utilize appropriate services, products, and support groups that can assist with care responsibilities and reduce stress on the client system.

3. Know how to access and explain the availability and effectiveness of resources for clients and client systems that help them meet personal goals, maximize function, maintain independence, and live in their preferred and/or least restrictive environment.

4. Evaluate the continued appropriateness of care plans and services based on changes with clients and client systems; assist client systems in altering plans and actions as needed.

5 Domain 5 | Healthcare Systems and Benefits

1. Understand how to advocate for clients and/or client systems so as to assist in navigating various healthcare systems and settings, and environments.

2. Understand transportation options in order to access medical care.

3. Provide knowledge and expertise to clients and/or client systems with regard to accurate and pertinent information on health care benefits and programs associated with Medicare, Medicaid, Veterans' Services, Social Security, and other public, non-profit, or private assistance programs.

4. Provide accurate information about long-term services and supports (LTSS) and coordinate care transition information for clients and/or client systems. These include, but are not limited to, public and private home and community-based resources (HCBS), residential care facilities for elders, assisted living waiver programs, hospitals, skilled nursing facilities, sub-acute care facilities, dialysis centers, palliative and hospice care programs. Conduct creative and informative research into options that best serve the client and/or client systems.

6 Domain 6 | Psychosocial and Family Systems

1. Understand how to prepare a comprehensive and holistic psychosocial assessment of the client and client system.

2. Demonstrate understanding of the diversity of traditional and non-traditional family structures and designated family member roles.

3. Incorporate all gender identity and sexual orientation preferences as part of the overall assessment and care planning process.

4. Effectively identify and apply cultural competence that includes, but is not limited to, religious and spiritual values and beliefs, ethnic and racial norms and practices, and socioeconomic status.

5. Understand the variety of communication processes used by families and groups, including the challenges with long-distance communication.

6. Demonstrate the understanding of the client's and family's need for support and counseling throughout the aging process. Develop skills to offer empathy, understanding, and compassion. Also understand the limits of the care management relationship and know when to refer to other professionals to address deeper psychological issues.

7. Understand how to design and execute a "safe plan" as it relates to a psychiatric emergency in the community. Explore the use of various tools such as a step-by-step plan, emergency response systems, designated cell phones, and check-in services. Engage client and client system in proactive planning around safety.

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7 Domain 7 | Mental Health and Substance Use Disorder (SUD)

1. Be aware of low-risk, at-risk, and problem and dependency issues related to alcohol and legal/illegal drug use in clients. Understand the psychological and emotional factors, physiological issues, diagnostic criteria, legal considerations, and co-occurrence of mental health disorders and poly-substance use concerns.
2. Understand the prevalence, signs, and symptoms of SUD in older adults and persons with disability, the characteristics of withdrawal, its effects on the individual and family dynamics, the characteristics of the stages of recovery, and community reintegration.
3. Be knowledgeable about current evidence-based, best practices for service provision to clients with SUD.
4. Be aware of SUD screening tools, forms, and assessments, including available community resources such as 12-step programs or other groups/programs.

8 Domain 8 | Ethics and Standards

1. Be knowledgeable about the Aging Life Care Association's Code of Ethics and Standards of Practice. (Current Standards may be found at aginglifecare.org.)
2. Understand how to use peer consultation and/or supervision to resolve ethical dilemmas.
3. Be knowledgeable of and abide by all state and federal regulations regarding privacy and confidentiality. Exercise due care regarding the client and client system's information through the proper use of release of information forms and judicious sharing of confidential information.

For more information about Aging Life Care, please visit aginglifecare.org.

9 Domain 9 | Housing

1. Understand the range of housing options available in the community, including but not limited to: independent living, assisted living, continuing care retirement communities (CCRCs), congregant, housing, and subsidized housing.
2. Be able to provide information to clients and/or client systems regarding how to evaluate housing options and submit appropriate applications.
3. Be prepared to assist clients and/or client systems in determining the most appropriate housing for current and future needs.

10 Domain 10 | Legal/Financial

1. Understand the five basic documents that every adult should have:
   a. Will
   b. Durable Power of Attorney
   c. HIPAA Release
   d. Health Care Proxy
   e. Advanced directives statement (e.g. living wills, personal directives statements, MOLST/POLST forms)
2. Understand when court appointed representatives (e.g. guardian, conservator, fiduciary) may be required and understand responsibilities of any legal fiduciary. Have basic understanding of court process to obtain fiduciary appointments.
3. Develop basic understanding of financial instruments, including but not limited to: bank accounts, brokerage accounts, life insurance policies, annuities.
4. Understand gross versus net income and relationship of income to potential benefits.
5. Understand when clients should be referred to other professionals for advice (e.g. attorneys, accountants, financial advisors).
6. Develop basic understanding of subsidy programs available to clients and how to assess assets and income to determine eligibility for subsidies.

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