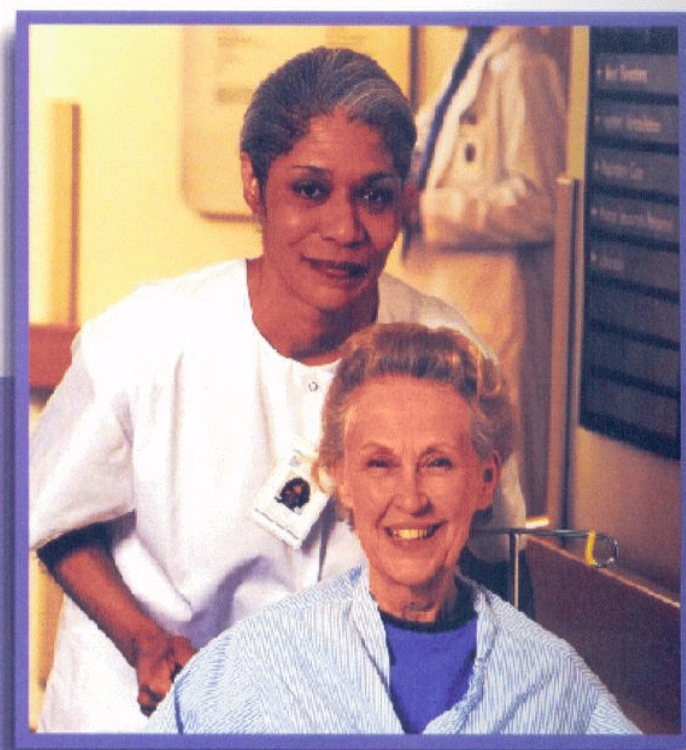


An Invitational Symposium on the long-term care paraprofessional workforce
Sponsored by the U.S. Departments of Labor and Health and Human Services



MAY 23-25, 2004

*P*athway to the Future:
How Workforce Development and
Quality Jobs Can Promote Quality Care

Department of
Health and Human
Services



Department
Of
Labor



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SYMPOSIUM LOGISTICS

PATHWAY TO THE FUTURE: HOW WORKFORCE DEVELOPMENT AND QUALITY JOBS CAN PROMOTE QUALITY CARE

CONFERENCE AT A GLANCE

Sunday, May 23	
5:30 - 7:30	Welcome Reception
Monday, May 24	
7:30 - 8:00	Continental Breakfast
8:00 - 9:00	PLENARY ONE: <i>"Welcome and Conference Overview"</i>
9:00 - 10:15	PLENARY TWO: <i>"Linking Staffing and Quality"</i>
10:15 - 10:30	Break
10:30 - 11:45	Small Group Break Out Sessions
11:45 - 1:30	Lunch <i>Secretary Elaine L. Chao</i> KEYNOTE SPEAKER: Governor Kempthorne, Idaho
1:30 - 1:45	Break
1:45 - 3:30	PLENARY THREE: <i>"Connecting Workforce Development Initiatives, Individual Economic Opportunity and Quality Care"</i>
3:30 - 3:45	Break
3:45 - 5:15	Small Group Break Out Sessions
5:15 - 6:15	Break
6:30 - 7:30	Dinner <i>"HEARTWORK" Presentation</i>
Tuesday, May 25	
8:00 - 9:00	Continental Breakfast
9:00 - 9:15	<i>"National and Local Workforce Shortages and Data Needs"</i>
9:15 - 10:15	PLENARY FOUR: <i>"The Impact of Workforce Improvement Initiatives on Workforce Recruitment and Retention"</i>
10:15 - 10:30	Break
10:30 - 12:15	PLENARY FOUR (continued)
12:15 - 12:30	Break
12:30 - 2:30	Working Lunch -- Small Group Breakout Sessions
2:30 - 2:45	Break
2:45 - 3:30	Concluding Session

Agenda

Sunday, May 23, 2004

5:30 p.m. - 7:30 p.m.

Welcome Reception

Hosted by John Hoff
Deputy Assistant Secretary for Disability, Aging and Long-Term Care Policy
Office of the Assistant Secretary for Planning and Evaluation
Department of Health and Human Services

Monday, May 24, 2004

7:30 a.m. - 8:00 a.m.

Continental Breakfast

8:00 a.m. - 9:00 a.m.

PLENARY ONE: "Welcome and Conference Overview"

8:00 a.m. - 8:20 a.m. Federal Sponsor Presentations

- **John Hoff**
Deputy Assistant Secretary for Disability, Aging and Long-Term Care Policy, Office of the Assistant Secretary for Planning and Evaluation, Department of Health and Human Services

- **David E. Gray**
Acting Assistant Secretary for Policy, Department of Labor

8:20 a.m. – 8:30 a.m.

- **Robyn Stone**
Executive Director, Institute for the Future of Aging Services

- **Steven Dawson**
President, Paraprofessional Healthcare Institute

8:50 a.m. - 9:00 a.m. Audience Questions and Comments

9:00 a.m. - 10:15 a.m.

PLENARY TWO: “Linking Staffing and Quality”

- **Robyn Stone**
Executive Director, Institute for the Future of Aging Services
Overview and Introduction
- **Ted Benjamin**
Professor, Department of Social Welfare, University of California Los Angeles
“The Direct Care Workforce and the Quality of Care”
- **Larry Minnix**
President, American Association of Homes and Services for the Aging
“Quality Care, Healthy Cultures: Evidence of Success.”
- **Carol Raphael**
CEO, Visiting Nurses Service of New York (VNSNY)
“The Role of the Direct Care Worker and Quality Care”

Audience Questions and Comments

10:15 a.m. - 10:20 a.m.

Instructions to Small Groups

- **Andreas Frank**
Director, Division of Long-Term Care Policy, Department of Health and Human Services
- **Stephanie Swirsky**
Office of the Assistant Secretary for Policy, Department of Labor

10:20 a.m. - 10:30 a.m.

Break

10:30 a.m. - 11:45 a.m.

Small Group Break Out Session 1

11:45 a.m. - 1:30 p.m.

Luncheon Address

Introductory Remarks

- **Elaine E. Chao**
Secretary, Department of Labor (invited)
- **Tommy G. Thompson**
Secretary, Department of Health and Human Services (invited)

Keynote

- **Dirk Kempthorne**
Governor, State of Idaho
Chair, National Governors Association
“A Lifetime of Health and Dignity: Confronting Long-Term Care Challenges in America”

1:30 p.m. - 1:45 p.m.

Break

1:45 p.m. - 3:30 p.m.

PLENARY THREE: “Connecting Workforce Development Initiatives, Individual Economic Opportunity and Quality Care”

1:45 p.m. - 2:00 p.m.

Overview Presentation: *“Recruiting and Retaining a Quality Paraprofessional Workforce: Building Collaboratives with the Workforce Investment System”*

- **Mike Fishman**
The Lewin Group
- **Burt Barnow**
John Hopkins University

2:00 p.m. - 3:30 p.m.

Federal, State and Local Workforce Development Initiatives

- **Gay Gilbert**
Employment and Training Administration, U.S. Department of Labor
“Department of Labor’s High Growth Job Training Initiative”
- **Lloyd Schipper**
Deputy Secretary, South Dakota Department of Labor
“Good Samaritan Career Lattice Project”
- **Juan Manigault**
CEO, Northern Indiana Workforce Investment Board
“Healthcare Partnerships in Northern Indiana”
- **Charles Bodhi**
Director of Employer Services, Regional Employment Board of Hampden County, Inc.
“Extended Career Ladders: A Local Workforce Development Perspective”

Audience Questions and Comments

3:30 p.m. - 3:45 p.m.

Break

3:45 p.m. - 5:15 p.m.

Small Group Break Out Session 2

5:15 p.m. - 6:15 p.m.

Break

Possible places to gather: Tower Lounge (Upper Mezzanine) or Federal Bar (Main Lobby Level)

6:30 p.m. – 7:30 p.m.

Dinner and Presentation: “HeartWork“

Introductory Remarks:

- **Ms. Karen Kulp**
President, Home Care Associates
 - **Ms. Charlotte Hobson**
Personal Care Attendant, HeartWork Performer
-

Tuesday, May 25, 2004

8:00 a.m. - 9:00 a.m.

Continental Breakfast

Free networking time for participants

9:00 a.m. - 9:15 a.m.

Presentation

- **Jean Moore**
Center for Health Workforce Studies, SUNY School of Public Health
“HRSA’s Study on Nursing Aides and Home Health Care Aides”

9:15 a.m. - 10:15 a.m.

PLENARY FOUR: “The Impact of Workforce Improvement Initiatives on Workforce Recruitment and Retention”

- **Patsy Harris**
Executive Director, Direct Care Alliance
“The Direct Care Alliance”
- **Debra Lipson**
Deputy Director of Better Jobs, Better Care, Institute for the Future of Aging Services
“Better Jobs, Better Care”
- **Ruth Katz**
Office of the Assistant Secretary for Planning and Evaluation, Department of Health and Human Services
“Department of Health and Human Services Initiatives to Improve the Long-Term Care Workforce”

Audience Questions, Comments

10:15 a.m. - 10:30 a.m.

Break

10:30 a.m. - 12:10 p.m.

PLENARY FOUR: “The Impact of Workforce Improvement Initiatives on Workforce Recruitment and Retention” (continued)

- **Lauren Harris-Kojetin**
Director of Research, Institute for the Future of Aging Services
“Research Synthesis on Long-Term Care Workforce Recruitment and Retention Initiatives”
- **Vera Salter**
Director, National Clearinghouse on the Direct Care Workforce, Paraprofessional Health Care Institute
“National Clearinghouse on the Direct Care Workforce”
- **Michael Elsas**
President, Cooperative Home Care Associates
“The Impact of Workforce Initiatives on Recruitment, Training and Retention”
- **John Schnelle**
Professor, School of Medicine, UCLA,
Director, Bourn Center for Gerontological Research
“Nursing Home Workforce and Quality”

Audience Questions and Comments

12:10 p.m. - 12:30 p.m.

Break

12:30 p.m. - 2:30 p.m.

Working Lunch (in Break Out Rooms) and **Break Out Session 3**

2:30 p.m. - 2:45 p.m.

Break

2:45 p.m. - 3:45 p.m.

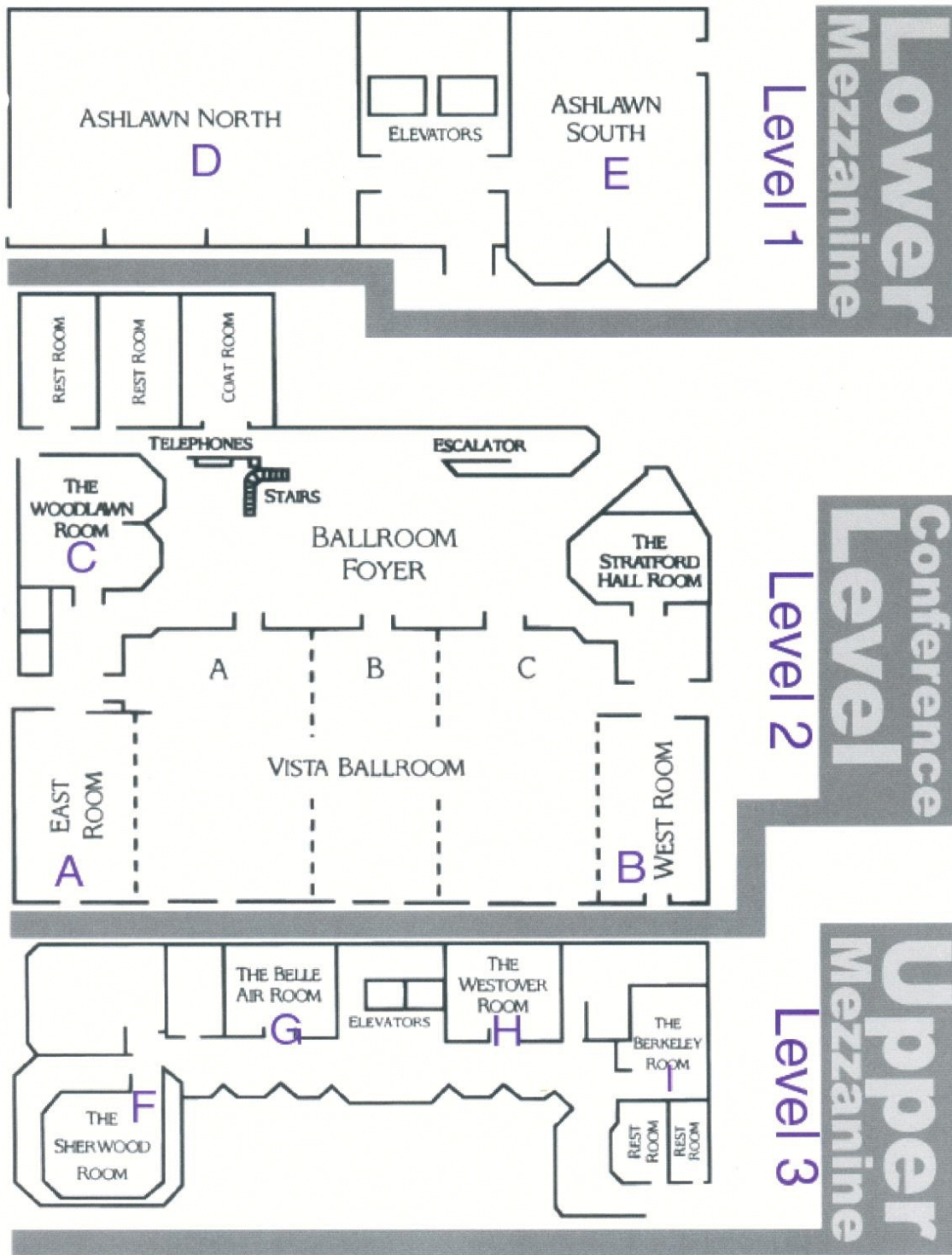
Concluding Session

4:00 p.m.

Adjourn

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the financial support the alliance will need to become its own 501(c)3 nonprofit organization separate from PHI. Patsy has over 12 years of experience in management, health care consulting, and programming and has participated in economic and workforce development initiatives in the Austin, Texas area. She graduated from Sam Houston State University with a BA in government and business and completed her MPA at Southwest Texas State University.

Ruth E. Katz

Deputy to the Deputy Assistant Secretary for the Office of Disability, Aging and Long-Term Care Policy, in the Office of the Assistant Secretary for Planning and Evaluation, U.S. Department of Health and Human Services. She oversees a range of policy and research activities related to disability and aging. With over 25 years of experience with disability and long-term care issues, these include: managed care and other health and long-term care delivery systems--financing, structure and quality; home and community-based services; nursing home and post-acute care financing and quality; Medicare, Medicaid and private insurance policy related to people with disabilities and chronic conditions; alternative residential systems; and health information technology as it relates to post acute and long-term care.

Dirk Kempthorne, Governor of Idaho

He was born in San Diego, California, and attended the University of Idaho, earning a bachelor's degree in political science in 1975. Kempthorne was elected mayor of Boise, Idaho, in 1984 and served for seven years. He was elected to the U.S. Senate in November 1992. His first bill, legislation to end unfunded federal mandates on state and local governments, became Senate Bill 1 in the 104th Congress. It was signed into law on March 22, 1995, at a Rose Garden ceremony. Kempthorne authored the new Safe Drinking Water Act in 1996, which provided clean, safe, and affordable drinking water without federal restrictions. He was a member of the Environment and Public Works Committee, which produced a highway bill to dramatically increase the amount of federal funds coming to the states for road, bridge, and infrastructure repair. He chaired the Drinking Water, Fisheries, and Wildlife Subcommittee; served on the Armed Services Committee, chairing the Military Personnel Subcommittee; and served on the Small Business Committee. The Idaho Jaycees selected him as Outstanding Young Idahoan in 1988, and he has earned the Distinguished Service Medal, the top civilian honor from the Idaho National Guard. Kempthorne is past president of the Council of State Governments, past chair of the Western Governors' Association, and a member of the Executive Committee of the Republican Governors Association. Governor Kempthorne is chairman of the National Governors Association.

Lauren Harris-Kojetin

Director of Research at the Institute for the Future of Aging Services. She directs and coordinates the Institute's research agenda. Dr. Harris-Kojetin has 15 years experience in applied research with an emphasis on: health care quality, access, and education for older adults and program evaluation. She leads and contributes to projects to: improve the quality and stability of the long-term care workforce; improve the quality of services provided to elders; educate consumers about quality in health care and aging services; and, promote healthy behaviors in older adults through education, programming, and environmental design. Her methodological expertise includes case studies, surveys, key informant interviews, usability testing, statistical analysis, experimental and quasi-experimental design, and focus groups and interviews with elders and persons with disabilities. She has directed numerous federal research studies for the Agency for Healthcare Research and Quality, the Centers for Medicare and Medicaid Services, and the Assistant Secretary for Planning and Evaluation on topics such as health plan quality, survey design, health education and decision making for older adults, Medicare education, and using research to help develop a quality long-term care workforce. Dr. Harris-Kojetin has published

frequently on measuring and communicating health care quality for older adults. She has a PhD and MA in Public Policy from Rutgers University.

Debra J. Lipson

She has over 20 years experience as a health policy analyst, program administrator and community organizer, at the local, state, national and international level. Currently, she is Deputy Director of the Better Jobs Better Care Program at the Institute for the Future of Aging Services, based at the American Association of Homes and Services for the Aging in Washington DC. Better Jobs Better Care is a \$15 million research and demonstration program funded by the Robert Wood Johnson Foundation and The Atlantic Philanthropies, which tests and studies effective ways to strengthen the long-term care workforce. She directs the grant selection and management process, develops communications strategies and products, and oversees and provides technical assistance to grantees.

Prior to her current position, Ms. Lipson worked at the World Health Organization in Geneva Switzerland, where she analyzed the implications for national health policies of international development programs and global and regional trade agreements. She has served as Associate Director of the Alpha Center, a health policy organization in Washington DC, where she specialized in policy studies related to Medicaid, state programs to cover the uninsured, and maternal and child health, and worked in several other Washington-based state health policy organizations. At the local level, she helped to create a long-term care case management program in San Francisco, and adolescent health promotion programs in Detroit. Ms. Lipson is widely published in health professional journals. She has a Masters in Health Services Administration from the University of Michigan, School of Public Health.

Juan A. Manigault

President and Chief Executive Officer of the Northern Indiana Workforce Investment Board, Inc. This business-led Board is the regional agency responsible for managing the demand and supply-side of the region's labor market. He is a graduate of the University of Notre Dame with a B.A. in English and received his M.S.B.A. from Indiana University Northwest.

Mr. Manigault's career includes experience in the private, public and non-profit sectors. His areas of expertise include leadership development, strategic planning, technology utilization, collaboration and visioning. He is recognized as a leader in Indiana having served as a member of the Indiana Human Resource Investment Council, Indiana School-to-Work Advisory Council, Governor's Commission on Workforce Preparation, Indiana Career Education Advisory Council, and the Governor's Task Force on Economic Development. He is currently a member of the Board of Directors of Teachers Credit Union, the Country's 54th largest Credit Union, Ray Bird Ministries, Business Development Corporation and the Indiana Adult Literacy Coalition.

Larry Minnix

President and CEO of the American Association of Homes and Services for the Aging (AAHSA), a position he has held since 2001. AAHSA represents several thousand not-for-profit aging services organizations. Dr. Minnix received his undergraduate and graduate degrees from Emory University. He has been in mental health and aging services fields for over 35 years. He was associated with the Wesley Woods Center of Emory University for 28 years, where he started as an administrative intern in 1972 and rose to the position of CEO, a position he held for 10 years until he joined AAHSA. Wesley Woods is a comprehensive aging services organization, with acute, outpatient, outreach, housing, and nursing home care within the academic context of Emory University. He is a frequent speaker on long term care, quality, ethics, and policy. He has served on numerous commissions and boards.

Jean Moore

Director of the New York Center for Health Workforce Studies at the School of Public Health at SUNY Albany. Ms. Moore has worked at the Center for four years and has served as principal project staff for health workforce studies that focus on the supply, demand, use, and education of health personnel, particularly the nursing workforce. She has also conducted studies of the availability of health care services in areas that may qualify for shortage designation.

Prior to joining the Center, Ms. Moore spent more than fifteen years at the New York State Department of Health where she was responsible for overseeing more than \$100 million dollars per year in health workforce education and training funds.

Ms. Moore is currently completing a Masters of Public Health at the SUNY Albany School of Public Health. She holds two masters degrees from Russell Sage College, one in nursing education and one in psychiatric nursing as a clinical specialty. She received her bachelors in nursing from the SUNY College at Plattsburgh.

Carol Raphael

President and Chief Executive Officer of the Visiting Nurse Service (VNS) of New York, the country's largest voluntary home health care organization with a budget of \$867 million, and 10,400 employees. The organization provides a wide range of acute, rehabilitative and long-term care services to 25,400 patients daily. It operates a managed long-term care plan for dually eligibles and the Center for Home Care Policy and Research which studies the management, cost quality, and outcomes of home- and community-based services.

Previously, Ms. Raphael held positions as Director of Operations Management at Mt. Sinai Medical Center and Executive Deputy Commissioner of the Human Resources Administration in charge of the Medicaid and Public Assistance programs in New York City. Ms. Raphael is a member of MedPAC, the commission that advises Congress on Medicare payments and policies. She serves on several Robert Wood Johnson Foundation advisory committees and New York State panels including the Medicaid Reform Task Force, and the New York State Hospital Review and Planning Council, for which she chairs the Fiscal Policy Committee. She is on the Boards of Lifetime Healthcare Companies, Future Health Corporation, The Greater New York Hospital Association, the Continuing Care Leadership Coalition, the American Foundation for the Blind, Pace University and a fellow of the New York Academy of Medicine. She was a member of the Pfizer Hispanic Advisory Board and the Kaiser Permanente Planning Group and an Issues Expert at the White House Conference on Aging. She was a recipient of the Harvard Kennedy School of Government Alumni Achievement Award and the YWCA's Academy of Women Achievers awards. Ms. Raphael was a Visiting Fellow at the King's Fund in the United Kingdom. She has authored papers and presentations on post-acute, long-term care and end-of-life care and co-edited the book "Home Based Care for A New Century." She has an M.P.A. from Harvard University's Kennedy School of Government and completed its Senior Executive Program.

Vera K. Salter

Director of the National Clearinghouse on the Direct Care Workforce at the Paraprofessional Healthcare Institute (PHI). The National Clearinghouse brings together policy- and practice-related resources from around the country and makes them available to providers, consumers, workers, researchers, and policy-makers who are concerned with the growing labor crisis in long-term care. PHI is committed to improving the quality of jobs for paraprofessional health care workers through demonstration projects, policy analysis, education and advocacy.

Prior to joining PHI, she was co-owner of a national planning and marketing firm that consulted with clients across the continuum of health and long-term care services.

She has also served as Vice-President with a multi-institutional healthcare system for over ten years, and has held a number of health planning and research positions.

Dr. Salter holds a Ph.D. in Sociology from the University of Pittsburgh, with a concentration in health services research. She has Master's degree in Social Administration from the University of Essex, and a Bachelor's degree in Economics from the University of Sussex, both in the United Kingdom. She has also served as a visiting Senior Research Associate at the Health Policy Institute at the University of Pittsburgh and has held an adjunct faculty position at Carnegie Mellon University's Heinz School.

Lloyd Schipper

He is Deputy Secretary of the South Dakota Department of Labor. A twenty-three year veteran of this department, he has served in several leadership roles throughout his career. Like most small-state administrators he wears numerous hats, but perhaps his most challenging task is to oversee the activities of South Dakota's statewide system of sixteen "Career Centers." These Centers are the primary delivery system for employment and training programs designed to meet the needs of job seekers and employers alike. South Dakota can be considered a rural state with a population of 755,000 people spread over an area of 77,000 square miles.

John Schnelle

Professor of Medicine and Director of the UCLA/Jewish Home/Borun Center for Gerontological Research. He has over 30 years of experience implementing interventions in nursing homes to improve urinary and fecal incontinence, weight loss, and mobility decline. This work is reflected in 175 publications. His efforts to translate these interventions into nursing home practice have led to the identification of system-wide barriers to change that are directly related to issues concerning the nursing home workforce.

Robyn I. Stone

She is a noted researcher and internationally recognized authority on health care and aging policy. In June 1999, she joined the American Association of Homes and Services for the Aging to establish and oversee the Institute for the Future of Aging Services. She is the Institute's executive director.

Dr. Stone has held senior research and policy positions in both the U.S. government and the private sector. She was a political appointee in the Clinton Administration, serving in the U.S. Department of Health and Human Services as Deputy Assistant Secretary for Disability, Aging and Long-term Care Policy from 1993 through 1996 and as Assistant Secretary for Aging in 1997. In the 1980s and early 1990s, she was a senior researcher at the National Center for Health Services Research and at Project HOPE's Center for Health Affairs. Dr. Stone has been on the staff of two important national task forces, the 1989 Bipartisan Commission on Comprehensive Health Care (the Pepper Commission) and the 1993 Clinton Administration Task Force on Health Care Reform.

Dr. Stone is a distinguished speaker and has been published widely in the areas of long-term care policy and quality, chronic care for the disabled, workforce development and family caregiving. Her doctorate in public health is from the University of California, Berkeley.

Acronyms for HHS-DOL “Pathway to the Future” Symposium

ADL	Activity of Daily Living (such as bathing, eating, dressing, toileting)
AJB	America’s Job Bank
ASP	Assistant Secretary for Policy, DOL
ASPE	Assistant Secretary for Planning and Evaluation, HHS
BLS	Bureau of Labor Statistics, DOL
BRG	Business Relations Group (part of DOL’s Employment and Training Administration)
CMS	Centers for Medicare and Medicaid Services, HHS
CNA	Certified Nursing Assistant
DCW	Direct Care Worker
DOL	Department of Labor
DON	Director of Nursing
ETA	Employment and Training Administration, DOL
HCBS	Home and Community Based Service
HHA	Home Health Aides
HHS	Department of Health and Human Services
HRSA	Health Resources and Services Administration, HHS
IADL	Instrumental Activity of Daily Living (such as money management, housework, meal prep)
IFAS	Institute for the Future of Aging Services
IOM	Institute of Medicine
LPN	Licensed Practical Nurse
LTC	Long-Term Care
LVN	Licensed Vocational Nurse
ODEP	Office of Disability Employment Policy, DOL
PAS	Personal Assistance Service
PHI	Paraprofessional Healthcare Institute
RN	Registered Nurse
SNF	Skilled Nursing Facility
TA	Technical Assistance
TANF	Temporary Aide to Needy Families
TO	Turnover
WIA	Workforce Investment Act of 1988
WIB	Workforce Investment Board

Related Links

Other sections of this conference package include:

- ✓ Background Materials [<http://aspe.hhs.gov/daltcp/reports/04cfpk02.pdf>]
- ✓ Speaker Presentations [<http://aspe.hhs.gov/daltcp/reports/04cfpk03.pdf>]

Additional papers written for the Office of the Assistant Secretary for Planning and Evaluation in conjunction with this conference include:

- ✓ Raynor, Charissa R.: ***Federal Workforce Development Programs: A New Opportunity for Recruiting and Retaining Direct Care Workers in the Long-Term Care Field*** (August 2003). [<http://aspe.hhs.gov/daltcp/reports/fedwfdp.htm>]
- ✓ ***Pathway to the Future: How Workforce Development and Quality Jobs Can Promote Quality Care--Symposium Summary*** (July 2004). [<http://aspe.hhs.gov/daltcp/reports/04cfpksum.htm>]
- ✓ Harris-Kojetin, Lauren, Debra Lipson, Jean Fielding, Kristen Kiefer and Robyn I. Stone: ***Recent Findings on Frontline Long-Term Care Workers: A Research Synthesis 1999-2003*** (May 2004). [<http://aspe.hhs.gov/daltcp/reports/insight.htm>]
- ✓ Fishman, Michael E., Burt Barnow, Asaph Glosser and Karen Gardiner: ***Recruiting and Retaining a Quality Paraprofessional Long-Term Care Workforce: Building Collaboratives with the Nation's Workforce Investment System*** (May 21, 2004). [<http://aspe.hhs.gov/daltcp/reports/natwis.htm>]