

Kendal at Home
Project Description of CAPABLE Pilot Project
For the Friends Foundation for the Aging
September 2022

Executive Summary

Kendal at Home is a nonprofit organization helping seniors live better, healthier lives at home. Our Kendal at Home program has been successful in helping hundreds of senior citizens stay in their homes and retain their independence. We now plan to launch a new program, targeted to lower-income seniors: an evidence-based model called CAPABLE: Community Aging in Place—Advancing Better Living for Elders. This model was developed at Johns Hopkins University and has been proven to lower Medicare costs for participants and improve health and well-being outcomes for older adults. Our request is for \$25,000 in funding to support the launch of this program. Once the program is fully implemented, we expect Medicare reimbursements to cover its costs, making it sustainable into the future.

Need Statement and Target Population

Nearly 4 in 10 older adults have some difficulty performing at least one activity of daily living (ADL) such as bathing, dressing, or walking. These difficulties are associated with poor quality of life, depression, and high healthcare costs. Being dependent on family or a paid aide for these basic functional tasks is costly to families and society. At the same time, the majority of older adults – 77% - hope to age in place (“2021 Home and Community Preferences Survey: A National Survey of Adults Age 18-Plus,” AARP, November 2021). The CAPABLE program was developed to create an evidence-based model that would empower seniors to stay at home safely, retain their independence, and improve their daily health, functionality, and well-being.

Disability is an especially pressing issue for low-income older adults because they have a higher prevalence of disability than average and often have housing conditions that exacerbate the effects of disability (such as broken flooring). The CAPABLE program is designed to address both direct health care needs and the various social determinants of health, such as housing conditions and transportation barriers. Drawing on evidence that person-directed strategies that target individual priorities are especially effective, CAPABLE created a person-directed, tailored intervention to improve daily function and to meet the needs of low-income older adults.

Cuyahoga County has a high percentage of senior residents compared to the state as a whole, and also a comparatively high rate of poverty. Fully 19% of Cuyahoga County residents are aged 65+, compared to 17.8% of Ohio residents overall. More than 15% of Cuyahoga County residents have household incomes below the federal poverty level, compared to 12.6% of Ohio residents. Cuyahoga County residents have a median household income of \$51,741, much lower than that state median of \$58,116. Cuyahoga County residents are also disproportionately people of color: 40% identify as Black, Hispanic, Asian, or biracial (all data in this paragraph from U.S. Census July 2021 Estimates). These more vulnerable seniors are potential CAPABLE participants.

Solution to Address the Problem

CAPABLE, developed at Johns Hopkins University and now implemented in more than 30 sites around the country, has shown that their model of care and their team of helpers can improve function in older adults. The model features five months of intensive in-home support provided by a coordinated team. This team is comprised of an occupational therapist, registered nurse, and handy worker, whose efforts are centrally led and coordinated; Kendal at Home's Director of Clinical Services will lead the CAPABLE project. The team's collective goal is to improve the life of the participant they are assisting, guided by that individual's personal goals and needs.

Potential participants are interviewed by telephone by a knowledgeable CAPABLE team member. They are asked about their readiness to change, as well as their willingness to set goals and work with the CAPABLE team to achieve those goals. A CAPABLE team member assesses cognitive ability, identifies challenges, and ensures the participant can schedule home visits over a five-month period. Typically for every 1,000 seniors 65 and older living in a given community, approximately 250 will be potential candidates for participation in the CAPABLE program. Kendal at Home will launch our program on a relatively small scale, seeking to enroll 75 participants initially, with plans to scale up enrollment in the second year.

Activities to be Undertaken

Once a participant is enrolled and a first meeting scheduled, each of the CAPABLE team members have important and complementary responsibilities, which are described below. The interdisciplinary team uses motivational interviewing, active listening, and coaching communication methods to enable each participant to delineate goals and priorities themselves.

The participant:

- Completes a self-assessment, sets her/his own goals and determines her/his priorities
- Brainstorms options/solutions as an active team member
- Makes progress between each visit, creating an Action Plan in her/his own words
- Exercises, reads material, practices skills within her/his home
- Uses new skills and equipment regularly.

The occupational therapist makes up to six visits and:

- Conducts a functional/mobility assessment of the participant
- Identifies home risks, as well as needed modifications & equipment
- Provides fall prevention and equipment guidance
- Develops action plans with the participant for each participant-identified goal.

The registered nurse makes up to four visits:

- Takes a health history and reviews current healthcare providers
- Identifies key health issues/risks
- Reviews pain issues and medications
- Develops action plans with the participants for each participant-identified goal.

The handy worker joins the team in the first month and:

- Receives a work order for home modifications/household items and confers with the participant and the occupational therapist
- Obtains supplies and installs needed home improvements in the home
- Average cost for all home improvements and supplies is about \$1,500 per participant.

During the final occupational therapist and nurse visits, clinicians conduct a wrap-up meeting with the participant to review progress on the participant’s action plans and successes and help them think about general solutions and approaches that may be used to address functional issues in the future. A member of the CAPABLE team will follow up annually with each participant after the five-month program period to check in and gauge their continued well-being.

Kendal at Home currently has a robust enrichment program offering focused on health, wellness and social engagement. We know that social interaction and intellectual engagement are important components to the well-being of seniors, so we offer a wide range of workshops and seminars which will be made available to all CAPABLE participants.

Kendal at Home will seek to partner with Medicare Advantage plans and Accountable Care organizations in an effort to build the program. As an evidence-based program, CAPABLE will be reimbursable by Medicare plans, enabling the program to be self-sustaining in the long term.

Partners and Implementation and Funding

As a licensed CAPABLE provider, Kendal at Home will enter into a close partnership with Johns Hopkins University and be part of a network of about 30 other CAPABLE program providers across the nation. We expect this network to be essential as we begin to undertake the project; already, we have solicited recommendations for a data system that other CAPABLE programs have used successfully.

Kendal at Home is working with a professional grant writer this year to identify and solicit funders who would be interested in helping to support the launch of CAPABLE. Since July of 2022, we have applied to:

- The Abington Foundation - \$25,000
- The Cleveland Foundation - \$50,000
- The Cliffs Foundation - \$25,000
- The George Gund Foundation - \$50,000
- The Higley Fund at the Cleveland Foundation - \$25,000
- The Nord Family Foundation - \$30,000

We expect to solicit other funders in the coming months, including:

- AARP Foundation - \$100,000
- The Community Foundation of Lorain County - \$25,000
- Kendal Charitable Foundation - \$15,000
- The RRF Foundation for Aging - \$25,000

Evaluation Plan

The CAPABLE program is proven to attain results for those who participate. The program can cut participant disability in half, and an independent evaluation showed that it resulted in more than \$20,000 in savings (a return on investment of more than 7X) in dual-eligible beneficiaries, driven by reductions in both inpatient and outpatient expenditures. In a nonrandomized evaluation of the CMS Innovation Center demonstration of CAPABLE, CMS evaluators estimated cost savings to Medicare of \$22,000 over two years for the average CAPABLE participant (at a total cost per participant of \$2,825).

The health and wellness benefits participants enjoy as part of the program are many and varied, including:

- Improving health behavior, such as encouraging healthy eating habits and exercise
- Reducing fall risk and hospital/emergency room visits by improving the home environment
- Managing chronic disease by monitoring key biometrics and medication compliance.

The CAPABLE program offers benefits to both the seniors who participate and also the healthcare system as a whole. During the program's first year, we will pursue the following objectives:

- Enroll 75 participants into the program
- Conduct a full assessment of each individual's self-reported needs and goals
- Assemble a care team and develop a care plan for each participant
- Retain at least 95% of participants through the full five-month duration of the program
- Conduct a post-program survey of at least 95% of participants
- Based on self-reported survey results, at least 50% of participants will report a significant increase in their well-being, such as improved mobility and daily functionality, decreased depression, and/or improvements in lifestyle (such as diet, exercise, and medication compliance)
- Based on post-program survey results, at least 70% of participants will report lowered healthcare costs as a result of their participation in CAPABLE.

The CAPABLE model has a detailed evaluation process with specific information to be collected from each participant at each visit, health data to be collected by the clinical team, and survey data collected at the start of the program and after program completion. We will use this data to assess our progress toward our program goals, as well as to share program data with the team at Johns Hopkins for their ongoing program evaluation efforts.

DEI and FFA Values

Kendal at Home has been working to develop strategies related to DEIB (Diversity, Equity, Inclusion and Belonging) for more than a year. This work started with the creation of a committee made up of board members, staff and members served by Kendal at Home. The group started by sharing education and information to assure that we are working together with a common understanding of the issues we are trying to address. We recently compiled a report which looks at our current demographics related to all three constituencies: our members, our staff, and our contracted workers. This will be a starting point for our progress toward improved DEIB. It is important to note that this work identified race, gender and age but did not reflect ethnicity/national origin, gender identity or expression, religious beliefs, or sexual orientation. Including all of these factors in the future will be critical to creating an organization that is truly committed to DEIB for everyone.

Kendal at Home has become SAGECare certified and all employees are required to participate in SAGE training upon hire. The SAGE program is a cultural competency curriculum especially developed for health care and senior living communities. We have developed a compensation philosophy that assures that all staff are paid an equitable and competitive wage. We have spent a great deal of time and effort building and strengthening the team and developing a culture in our organization that aligns with the Kendal Values. Weekly meetings are held which focus primarily on the ongoing work to uphold those values and incorporate them into every aspect of our daily work.

In spite of the efforts to date, Kendal at Home is not a diverse organization in terms of its staff or client population. We encounter bias and racism, particularly as it relates to caregivers in the homes of members. With a grant from the Kendal Charitable Foundation, we began to develop strategies to ensure the lasting impact of the DEIB work we are doing now, including crafting responses to identified issues of bias and inequity, regular review and alteration of progress toward our DEIB objectives, integration of constituent feedback into policies and procedures, ongoing training, and inclusive decision making.

Kendal at Home was founded on Quaker values, including the essential equality and dignity of all. The DEIB work described above dovetails with Quaker values and practices. Our intent with the creation of the CAPABLE program is to bring the benefits of home visiting to a population of vulnerable seniors who would not be able to afford Kendal at Home services. Studies show that 77% or more of seniors would prefer to age in place. The CAPABLE program will help seniors age at home safely and enjoy their later years in full. CAPABLE is a natural fit for our organization, as it brings an evidence-based model of care to the homes of low-income seniors, costs them nothing, and supports their health and independence.

Organizational Background

Founded on Quaker values, Kendal at Home has been transforming the experience of aging since 2004. Our unique life plan at home program empowers older adults to live the life they want, on their own terms, while providing the safety and security they and their family desire. Our mission is to provide individuals of diverse backgrounds, social identities and lifestyles with a range of options to promote successful aging wherever they choose to live.

Kendal at Home is a nationally recognized program combining three core elements: care management, a healthy aging plan, and care coverage. Together, this plan empowers members to thrive in their retirement years with the peace of mind that their long-term needs will be met. Our team of dedicated care coordinators are personally invested in their members' well-being and are there to support them with the services they need as they age.

Kendal at Home is an independent nonprofit under the umbrella of The Kendal Corporation, a nonprofit consortium of senior living communities and services across the U.S. Kendal at Home is the only organization in this consortium specializing in senior living at home and will be the first to implement the CAPABLE program, which focuses on more vulnerable seniors with low financial resources and at least one functional disability. We are excited to begin offering this program and help even more Ohio residents to thrive during their senior years.