Synchronicity Among Local and State Ombudsmen

Patty Ducayet
Suzanna Swanson
(P) Synchronicity

• Events unlikely to occur by chance occurring at the same time
• With communication, support, coordination we can synchronize messages and have a stronger, more successful advocacy program

We lost our way

• In Texas, we are so busy solving individual complaints, that we often set aside opportunities for systemic advocacy
Why this session was developed – to describe the positive impact we’ve experienced in Texas as a result of synchronizing our messages and opening new lines of communication

• With long-term care ombudsman workload at an all time high, and scarce resources, we need to work together
(P) Primary resources used:

1. Esprit de Corps: Cultivating Unity in the Statewide LTC Ombudsman Program, a session report from 1999 from a local ombudsman perspective that highlights:
   - How we can better serve residents?
   - What barriers to a successful program?
   - How to give a local ombudsman a sense of being a part of the statewide program?
2. Strengthening the Connection Between State and Local LTC Ombudsmen, a recently revised NORC paper based on Esprit de Corps and the NALLTCO Tips for SLTCO. This paper provides guidance for SLTCO.

• “An office of the State Long-Term Care Ombudsman Program functions as a whole, statewide, unified, integrated program delivering a range of individual, systemic, and educational efforts.”

• To SLTCO: Building a strong, unified ombudsman program is a process, one that starts in our first months on the job and continues throughout our term as SLTCO.

• SLTCO roles: advocate, leader, mentor, cheerleader
(S) Communication (10 min)

1. TA: tools to reference and consultation
   - Tools: communicate clear expectations of the state office, policy and procedures, reporting guidelines (OM desk reference)
   - Consultation: Potential complaints against an ombudsman (e.g. Metroplex); Referrals to elected officials, visits to elected officials’ offices; Guidance on challenging cases, ANE reporting
2. Program Management

- Support; example: getting SLTCO support in writing for tricky decisions like volunteer terminations, conflicts of interest

- Personnel:
  - (S) Hiring and firing, certification
  - AAA directors’ mistrust of state ombudsman—helping AAAs understand the role and importance of the ombudsman program

- Big vs. little programs
  - Approach to continuing education
  - State office time allotted to programs, recognition of successes (newsletter as example)
(S) Support (5-7 min)

- Complaints against an ombudsman
- Big complaints in a facility, complaints referred to regulatory, requests for reinvestigations (e.g. Westridge—preparing for backlash or repercussions)
- Example: Legal representation
- Visiting facilities together (S and P)
  - Volunteers
  - Program monitoring (local and state)
  - In addition to monitoring, routine visits
- Statewide training
  - Local programs hosting
  - Provide training that is asked for
  - Different avenues for training (webinars, regional)
(S) Connecting local to statewide program (5 min)

Example: Look for strengths, assign local ombudsman as a statewide representative on workgroups and task forces, also describe how Cathy translated one experience into a statewide training session for local ombudsmen

OAA reauthorization

- AoA Listening Forum, sharing the testimony from Ruth, Suza and Patty, talking about the experience of selecting a volunteer, communicating b/w state and local ombudsman, the experience of testifying at the listening forum.
(P) Coordination

Create a culture of feedback, encourage local programs to work together and help one another, be available during a crisis; Provider communications and travel—keep locals in the loop, establish a protocol for responding to complaints about the local ombudsman or volunteer, don’t undermine local work

• Disaster coordination and recovery
  – in times of crisis, this is an opportunity to support on a whole new level:
    • Help during closure
    • Response to disaster (e.g. Hurricane Ike)

• Quarterly meetings b/w ombudsmen and regulatory

• Training
  – Statewide training – networking lunch, cliques, learning circles, socializing dinners
  – Regional training, joint training
(P) Coordination

Lesson learned: Figure out what is negotiable and what is not

– Example: Get local ombudsman input on policy and procedures manual

– Example: Input from program volunteers on volunteer report
(S) NALLTCO Tips to State Ombudsmen (handout)
(P) Texas SLTCO Tips to Local Ombudsmen

• Give SLTCO a chance to earn your respect – a new “boss” is scary to everyone
• Tell SLTCO what you need; don’t forget to advocate for yourself
• Try to understand the role and challenges of a SLTCO – we may ask you to help
• Appreciate diversity among local programs and state ombudsman programs
(S) Table Top Exercises

• (S) Introduce
• 5-6 tables (10 minutes to ponder)
• 2 minutes each to report (10 minutes) with S and P offering feedback/insights as appropriate
10 minutes for questions and other discussion