



Summer 2017

Volume 12

No. 2

Engaging Aging

Utilizing PACE as a Health Care Partner

By Kate McCulloh and Sister Barbara Wincik, HM

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*“Where
there is no
honor for
the elderly,
there is no
future for
the young.”*

*Pope Francis
General Audience,
St. Peter’s Square
March 4, 2015*

As the median age in religious congregations rises and members’ health care needs escalate, leaders are faced with complex choices. Sister Toby Lardie, the Pastoral Leader of the Sisters of the Humility of Mary, notes, “Providing a comprehensive continuum of care for our elderly sisters has been a growing concern for us as we experience so many changes and reductions in benefits provided in the area of health care. Our sisters have given their lives to bring more abundant life to others through a variety of ministries, and now, in their elder years, we want to help them maintain a quality of life that encourages as much independence and engagement as possible. Providing quality services and adequate staffing in light of growing financial issues has been very difficult. And then we were introduced to Programs of All-Inclusive Care for the Elderly (PACE) and Living Independence for the Elderly (LIFE) in Lawrence County. That changed everything!”

The government programs Sister Toby refers to are Medicare and Medicaid programs. They offer a wide spectrum of care for eligible participants. Primary, acute, post-acute, and long-term services are provided in the individual’s home, thereby enabling each person to remain independent as long as possible. Rather than having to move to a nursing care facility, elders

Kate McCulloh, MA, (left) is Director of Sister Services for the Sisters of the Humility of Mary. As a licensed social worker, she has extensive experience in direct service and administration, including serving as the Coordinator of Aging Services for the Diocese of Youngstown, OH. She holds a MA in Behavioral Science and Aging Studies from the University of South Florida.

Sister Barbara Wincik, HM, (right) is a member of the Leadership Team for the Sisters of the Humility of Mary. She holds a Ph.D. in nursing from Barry University and has ministered in the field in varied specialties, including adult psychiatry as well as teaching nursing at Xavier University.



Utilizing PACE as a Health Care Partner, continued

can remain safely in their private residences and local neighborhoods. Individuals can join a PACE program if they meet the following criteria: (a) be 55 years or older; (b) live in the service area of a PACE organization; (c) meet the criteria for their state of residence as being in need of nursing home level of care; (d) be able to live safely in the community with the help of PACE services.

In Pennsylvania, the program is known as LIFE. Medicare and Medicaid make capitated payments to LIFE for their enrolled beneficiaries, who are called "Participants". The LIFE Provider Manual states that "LIFE manages and pays for all covered services, while providing primary care, home and community-based services to support the individual living at home. The integration of Medicare and Medicaid financing allows the LIFE program to deliver more of the services a person needs to live in her or his setting of choice, without having to navigate two insurance systems and coordinate services among multiple providers."

Our Congregation's Journey

The journey of the Sisters of the Humility of Mary with the PACE Program began in 2008 when the Villa Administrator and the Director of Sister Services attended an inter-community meeting in Pittsburgh. One of the speakers was extolling the benefits of the PACE Program, known regionally as LIFE, in Allegheny County. Our interest was immediately piqued and our disappointment great when we were told that at that time, LIFE programs did not serve our regional area, Lawrence County.

It took three years, but in 2011, the LIFE Program finally came to Lawrence County. LIFE Lawrence County is a partnership of Lutheran Senior Life and Heritage Valley Health System. To learn more about the feasibility of utilizing



Humility of Mary Sister Alma Siffrin (right in above photo) receives assistance in her morning routine from staff member Ms. Courtney Longwill.

the services of LIFE Lawrence County for our sisters, we met with LIFE's Executive Director and Marketing Coordinator. These initial conversations left us with serious reservations.

At the heart of our hesitation was the location of their services. Initially, all of LIFE's services were based in New Castle, PA, and their medical providers worked from the New Castle site as well. Since 1928, our Congregation has owned and operated St. Elizabeth Hospital in Youngstown, Ohio. Most of our sisters' medical needs have been met through that system. At the time, even our medical director was a physician from St. Elizabeth's Hospital. Because St. Elizabeth's was not a contracted provider for LIFE Lawrence County, our sisters would have to switch health care providers if we were to access LIFE services. We were fairly certain that the sisters would not welcome that change.

Utilizing PACE as a Health Care Partner, continued

Much to our delight, further discussion with LIFE personnel opened the doors to agreements being made with St. Elizabeth Hospital and all of their contracted physicians and services. This would enable our sisters to continue receiving care with their familiar medical providers. Even our medical director would be able to continue serving our sisters in consultation with LIFE's physician.

An additional reservation we had revolved around the personnel actually providing the care. Traditionally, LIFE Lawrence County provides the staff that will deliver the health care services. However, we already had a full complement of staff, some having cared for our sisters for years. We were hesitant about severing those long-term relationships our sisters enjoyed with our health care employees.

Again, we found ourselves blessed in the fact that LIFE was willing to negotiate with us. Our arrangement would let us keep our own employ-

ees and LIFE would reimburse us for the time that our staff spent caring for sisters who would be LIFE participants. LIFE would be responsible for the care plans, but our employees would implement them with the sisters. This arrangement benefited us as well as LIFE. We would retain our existing staff and LIFE would be exempt from having to mount an extensive hiring process. Additionally, LIFE gained a professional, experienced staff with a deep knowledge of our sisters.

Next Steps

Following our negotiations, the next step was to present our findings to the Leadership Team of the community. The benefits of having our sisters participate in this program became clear during that meeting. There were approximately 10 sisters who would be eligible for the LIFE services at the time. Following further discussion and clarification of any issues/questions raised by the Leadership Team, we were given

Pictured below, is the easily accessible inner courtyard and walking path for sisters unable to access the full campus of Villa Maria. Located in Villa Maria, PA, the Congregational facilities include extensive grounds, Villa Maria Education and Spirituality Center, and the Villa Farm.



Utilizing PACE as a Health Care Partner, continued

the go-ahead to pursue the services of LIFE Lawrence County for our sisters.

We first went to our Villa resident sisters to share with them all the information about the LIFE program. We felt it was important that they understand the program from the outset of any changes. Each sister was given a handout containing the overview of Lutheran Senior Life and LIFE Programs and we walked through each point in a presentation. The LIFE staff thoroughly explained the qualifications for eligibility in the program, the service components, and the benefits to the community. The sisters' response was very positive and encouraging.

Continuity of Care

The mission of Lutheran Senior Life and the mission of the Sisters of the Humility of Mary are very similar: bringing more abundant life to God's people. This shared sense of mission facilitated our working together. We were able

Pictured below, LIFE social worker, Ms. Shannon Zehetner (left) reviews care plans with Villa nurse manager, Ms. Nancy Kilbane, RN, MSN.



to integrate LIFE care plans with our existing model of provision of care. LIFE Lawrence County and Villa Maria staff collaborated as partners in serving our sisters. A wonderful continuity of care has been afforded by LIFE contracting with us to use our existing staff to provide care to our sisters. The financial income from this agreement has also been very beneficial in the operation of our health services unit.

How it Begins

Before a sister can participate in the LIFE program, she must first be assessed by LIFE's interdisciplinary team which includes a physician, nurse, social worker, dietician, recreational coordinator, and rehabilitation specialist. If she meets the criteria for participation in LIFE, a personal care plan is then developed according to each sister's individual needs. If our Villa staff cannot meet a sister's needs, LIFE staff or a contracted provider of service will be called in. Our Nurse Manager, Nancy Kilbane, RN, MSN, finds the LIFE Lawrence County partnership to be a true benefit. She states, "LIFE's responsiveness to patient care needs, whether equipment, supplies, or professional support, is always reliable, timely and dependable."

Benefits Continue to Unfold

Our sisters have benefitted from the LIFE program providing specialized durable medical equipment, rehabilitation services on site, and restorative programs to maintain strength and mobility. Additionally, some sisters have been helped by the services of a social worker. This professional assists them in their journey of transition to the nursing unit, and helps them to deal with the effects of chronic disease or changing physical abilities. Psychiatric services are also available if needed.

Utilizing PACE as a Health Care Partner, continued



Pictured above, Sister Cathy Joy Popoczy, HM, enjoys her new specialized wheelchair purchased for her by LIFE. Durable medical equipment, such as wheelchairs and lifts, are provided by PACE for participants.

Our sisters also have positive responses to the partnership with LIFE Lawrence County. Sister Cathy Joy Popoczy, a LIFE participant, comments, "I am so thankful for all they do for us, for allowing us to participate in this program. The benefits for me, personally, have been tremendous. I have a specialized wheel chair that enables me to get around and to participate with ease in our community meetings and all the events that happen here at the Villa. LIFE has been a blessing for us and, I think, for them as they have all learned so much about religious

life that they never knew."

Sr. Rose Mary Schmidt, a volunteer in the nursing unit and the former Director of Sister Services, observes, "It is wonderful to have the support of LIFE Lawrence County, both professionally and financially. It is a real blessing the way they collaborate with our staff to meet the sisters' needs."

Rosemary Fox, LPN, a 30+ year veteran of our nursing staff, has high praise for the partnership with LIFE. She notes, "They are always open to suggestions and are very flexible in meeting the needs of the sisters. The staff has the best interest of the sisters at heart. We work together well to meet their needs. The most difficult adjustment was getting used to their paperwork requirements --being a Medicare program there is a lot of paperwork!"

Conclusions and Challenges

LIFE is truly a comprehensive medical program. All medical needs of our participant sisters are met through this program. This includes all medications, supplies, durable medical equipment, therapies, basically everything a sister might ever need is covered by LIFE.

Still, there are always challenges in joining a PACE program. The success of any negotiations will depend on the flexibility and ability of the local PACE program to provide contract services. We were the first religious community to negotiate with LIFE Lawrence County. However, they were very willing to have conversations with LIFE programs in Allegheny County to discuss the history of the program's relationship with religious communities. Since our Villa is our sisters "home," LIFE services are delivered to each individual sister in her "home" just as they would be to any resident of Lawrence County.

Utilizing PACE as a Health Care Partner, continued

Another challenge is the necessary change in the culture of a community that is used to "going it alone." Partnerships may bring about many challenges, but they also bring far more benefits. A partnership with a local PACE program has the potential to offer so much more for the sisters in the care of a community than can be provided by the community alone.

Finally, an obvious major challenge is that PACE programs are not available in every local community. If you are interested, you may want to explore the website of the National PACE Association <http://www.npaonline.org/> to locate a PACE program near you. Your local Area Agency on Aging might also be a resource for finding a PACE program in a particular area.

Calendar 2017

Late June

- Direct Care Assistance checks mailed

August 1— 4

- CMSM Assembly; Scottsdale, AZ

August 8—11

- LCWR Assembly; Orlando, FL

August 22

- NRRO / AIG Webinar at 1:00 PM ET; topic TBD

September 26—28

- NRRO Planning and Implementation Workshop; Tampa, FL (Filled)

September 27—30

- NCDC Conference; San Diego, CA



Humility of Mary sisters, staff, and LIFE staff start the summer with a Memorial Day picnic (right) and a friendly game of cards (above).

From the Offices of NRRO

Brother Bob Metzger, SM, Associate Director for Planning and Education

In this issue of *Engaging Aging* we focus on the use of the Program of All-Inclusive Care for the Elderly (PACE). We at NRRO have been promoting the use of PACE for many years. Some religious congregations have been involved with PACE since the early 1990's.



PACE began in California and can now be found in 31 states. There are 233 PACE centers in the country being operated by 122 sponsoring organizations with more than 40,000 people involved in these programs. 100% of these people need a nursing home level of care but 95% live at home and only 5% reside in nursing homes. The average age of participants is 77 with 70% of them being women and 30% are men.

Almost all payments for PACE services are covered by Medicare and/or Medicaid. According to the Medicare website:

- If you have Medicaid, you won't pay a monthly premium for the long-term care portion of the PACE benefit.
- If you don't qualify for Medicaid but you have Medicare, you'll be charged these:
 - A monthly premium to cover the long-term care portion of the PACE benefit
 - A premium for Medicare Part D drugs
- There's no deductible or copayment for any drug, service, or care approved by your health care team.

- If you don't have Medicare or Medicaid, you can pay for PACE privately.

90% of PACE participants are dually eligible for Medicare and Medicaid; 9% are Medicaid only; and 1% pay a premium themselves or are Medicare only. More information about PACE can be found on the Medicare website at: <https://www.medicare.gov/your-medicare-costs/help-paying-costs/pace/pace.html>

The website for the National PACE Association referred to in the last paragraph of the article in this issue is a good source of information about the program and offers a map listing the locations of all the PACE centers in the country. We at NRRO encourage you to consider the program if it is available in your area.

Shortly after the distribution of this issue of *Engaging Aging* we will be mailing out the Direct Care Assistance checks for this year. The collection this year again exceeded \$30 million and we will be distributing \$25 million to 390 congregations requesting assistance. We are extremely grateful to the many generous donors to the Retirement Fund for Religious. Please continue to remember these donors in your prayers.

Reminder: Stay Connected

- If anyone is not currently receiving *Engaging Aging* but would like to do so, please send your name and address to NRRO, c/o Karen Canas, (kcanas@usccb.org) or call Karen at 202-541-3215.

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- We encourage you to copy and circulate *Engaging Aging*. Help us to expand our reach and serve new people.

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