

MEDTAPP – LifeBio Pilot Study Project Progress Report

Project Title: LifeBio Pilot Study		Project #	
<p>Project Information: LifeBio Pilot Study will evaluate the feasibility and impact of gathering patient life histories and creating biographies that can be shared with staff to improve person-centered care (PCC). The study team will develop and implement an outreach strategy to recruit, train and assist nursing facilities (NF) participating in the LifeBio Pilot Study. LifeBio will develop Life Story Booklets and Summaries, and coordinate their distribution, display, and usage in treatment planning and person-centered care. LifeBio will collect performance data to monitor the implementation process and lessons learned in the Pilot Study and participate in the development of a final report.</p>			
Submission Date: 2018 Q1, revised 5-21-18			
<p>Description of Accomplishments:</p> <ul style="list-style-type: none"> - GRC coordinated biweekly group meetings with all vendors. GRC monitored the progress of volunteer recruitment, nursing facility field operations, and volunteer and staff training planning. GRC received and approved monthly and quarterly progress reports from all vendors. GRC finalized OMR survey designs and the process for receiving and processing the surveys. GRC approved the use of the policy and protocol regarding abuse, neglect, and exploitation and plans for reengaging residents who opted out of the project. Finally, GRC submitted an updated contract and budget to ODM. - BRIA, UHCAN, and LifeBio developed a list of common questions to discuss with NH administrators and site liaisons. The questions are intended to facilitate processes of field operations for the evaluation, collection of the life histories of NH residents, and staff training for using the information. These questions covered items such as appropriate days and times for being on site to collect data, ensuring that sites have private spaces for conducting interviews, understanding daily routines of residents in each nursing home, and requesting activities calendars and contact information for notifications in case of quarantines or emergencies. - BRIA developed a 'nursing home liaison checklist' for its evaluation component to assist nursing home liaisons with tasks such as making lists of participants, selecting legal guardians or "most involved" family members, mailing postage-paid survey packages provided by BRIA, and tracking dates of distribution of project materials. - BRIA has begun conducting initial informational visits to our first matched pairs of nursing home sites to explain the study protocols. A joint site visit to Franklin Plaza was conducted by all the collaborating partners (BRIA, GRC, LifeBio, and UHCAN) on 12/11/2017. BRIA also conducted a joint visit to Stratford (formerly Kindred) with UHCAN on 12/13/2017. As UHCAN has also completed individual site visits to Jennings Hall and Concord, BRIA will follow up with these sites separately. Going forward, UHCAN and BRIA will complete site visits together to introduce the project and the evaluation to NH administrators and site liaisons. LifeBio staff will be notified when the site visits are scheduled in the event they are also able to attend. - UHCAN trained volunteers at Jennings Hall and prepared for its first in-person staff training at Franklin Plaza. - UHCAN collaborated with BRIA and LifeBio to conduct shared introductory interviews. Four interviews have been completed in Cuyahoga County. Identified NF resources i.e., internal volunteers from churches, schools, senior centers and other community groups. Reviewed calendars as well as schedule conflicts. 			
<p>Emerging/Pending Issues (that could impact schedule, scope or resources): The project has experienced several challenges that have impacted recruitment. Based on NF census data, we expected to recruit at least 50 long-stay residents per a facility. We have completed recruitment in 8 of 16 facilities and found only about 20 residents per a facility who meet eligibility criteria (BIMS score of 8 or higher, 60 years of age, long-stay) and 15 who ultimately consent to participate in the project.</p> <p>Due to the change in Scope/deliverables/timeline we do not anticipate a budget change. The budget was an effort based, cost reimbursable budget. The effort was expended on working through several processes to make the project successful (i.e. working on how to get more residents involved, etc...).</p>			
Action Steps for Scope of Work/ Deliverables	Status and Description (C= completed, P = progress, NP = no progress)	Target Date	Completion Date
GRC received, reviewed, and approved quarterly report for UHCANOhio on January 5.	C	1/5/18	1/5/18
GRC received, reviewed, and approved quarterly report for BRIA on January 5.	C	1/5/18	1/5/18
GRC scheduled and facilitated a call with BRIA to discuss the use of the OMR scantrons for the resident, family, and staff surveys on January 5.	C	1/5/18	1/5/18
GRC received updated versions of the OMR surveys for resident, staff, and family surveys from BRIA on January 15.	C	1/15/18	1/15/18
GRC scheduled and facilitated a call with BRIA, LifeBio.com, and UHCANOhio to debrief on Field Operations on January 30.	C	1/30/18	1/30/18

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GRC received the policy and protocol regarding abuse, neglect, and exploitation from BRIA and requested and approved the document with a change wording on February 6.	C	2/6/18	2/6/18
GRC met internally to discuss and plan for the processing and reporting of the resident, staff, and family surveys on February 6.	C	2/6/18	2/6/18
GRC held regular meetings with BRIA, UHCANOhio, and LifeBio.com to discuss project progress and next steps on 1/9, 1/23, 1/30, 2/6.	C	2/6/18	2/6/18
GRC requested information about spending in FY18, and projected numbers of residents who will have completed interviews in FY18 and who will need to be interviewed in FY19 from BRIA on February 12.	C	2/12/18	2/12/18
GRC scheduled and facilitated a meeting with UHCANOhio, BRIA, and LifeBio.com to discuss funding for the current and upcoming fiscal year and project progress on February 13.	C	2/13/18	2/13/18
GRC discussed the low response rate on family surveys with BRIA and approved for them to send reminder postcards to families on February 20.	C	2/20/18	2/20/18
GRC, BRIA, LifeBio.com, and UHCAN discussed and finalized the process for using the FTP to transfer survey data and reports to and from GRC and BRIA on February 22.	C	2/22/18	2/22/18
GRC met internally to discuss and plan for the upcoming fiscal year's budget and timeline on March 1.	C	3/1/18	3/1/18
GRC met with BRIA, UHCANOhio, and LifeBio to discuss project progress and next steps and discussed high observed opt-out and refusal rates of residents. GRC approved BRIA to contact NFs to inquire as to why the rates are high and to attempt to reengage residents who opted out of the project on March 6.	C	3/6/18	3/6/18
GRC submitted a revised LifeBio contract and budget to ODM to carry over funds from FY18 to FY19 on March 12.	C	3/12/18	3/12/18
GRC requested written updates on project progress from UHCANOhio, LifeBio.com, and BRIA on March 19.	C	3/19/18	3/19/18
GRC received and processed fake resident data from BRIA to test the survey processing system on March 22.	C	3/22/18	3/22/18
GRC received, reviewed, and approved monthly reports from LifeBio.com on 1/4, 2/6, and 3/23.	C	3/23/18	3/23/18
GRC received fake family data to test the survey processing system from BRIA on March 23.	C	3/23/18	3/23/18
Benjamin Rose Institute on Aging (BRIA)			
Establish a Data Use Agreement to access MDS data.	P. Finalization of the Data Use Agreement is in process.	5/5/17	
Pilot-test resident, family, and staff questionnaires with 5 NF residents at a select NF and refine survey instruments as needed.	C. Interview Pilot testing was completed with 4 members of a local senior center in Cleveland. Feedback from interviews was incorporated into data collection procedures. It allowed BRIA to refine the instrument.	12/31/17	11/17

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Collect baseline data on a staggered basis with residents, family and staff.	P. Eleven field interviewers have been hired to begin baseline collection. BRIA is working with GRC to develop OMR versions of resident, family/legal guardian and staff surveys.	6/30/18	
Assess the feasibility of using volunteers to sustain and expand the LifeBio program to other nursing homes in Ohio as a means of improving quality of care.	P. Conversations with GRC, UHCAN and LifeBio, along with initial visits with NHs, continue to reveal a strong desire among administrators and liaisons to use volunteers to implement a life-story-based intervention to enhance person-centered care.	12/01/18	
Contribute to a plan to sustain and expand the LifeBio program to other nursing homes in Ohio as a means of improving quality of care, including an assessment of the feasibility and an itemization of the costs and benefits.	P. BRIA, in collaboration with GRC, UHCAN, LifeBio, will evaluate the results of the LifeBio Pilot project and will make recommendations to the Ohio Dept. Of Medicaid on the sustainability and expansion of the project to NHs across Ohio.	12/30/18	
Lead the development of the final report and dissemination of materials including an audiovisual demonstration product.	NP. As previously stated in other reports, the final report will be due at the end of the project.	12/01/18	
LifeBio Inc			
Refine and continue outreach strategy to recruit paired NFs to participate in the LifeBio Pilot Study. Recruitment will continue until 800 residents in total residents in total have been recruited at paired NFs	<p>C -</p> <p>January - Contacted University Manor via email and phone to replace Eliza Jennings (who was unable to participate) on 1/30/2018. All other sites are recruited and onboard.</p> <p>February – Received email from University Manor that they are able to participate to bring us back to 16 sites recruited.</p> <p>March – Re-opened consideration that we may need 4 additional sites, bringing the count to 20. Awaited BRIA’s recommendations on these sites.</p>	5/15/2018	
Train NF staff to use LifeBio resources to provide person-centered care (PCC) through an initial one-hour on-site training. The training will also be recorded to use as a webinar to maximize participation.	P -	5/31/2018	
Provide training to a minimum of five people at each NF, including at least three direct care staff, the activity director, and the organization’s administrator.	P – Prepared for first staff training scheduled at Franklin Plaza on 4/9/2018.	5/15/2018	
In collaboration with each NF, identify an activity director and administrator to complete required activities.	<p>C -</p> <p>January: Contacted University Manor via email and phone to replace Eliza Jennings (who was unable to participate) on 1/30/2018. Asked for the proper activity director and administrator contacts.</p> <p>February – Received confirmation that University Manor could participate on 2/2/2018.</p> <p>March – Re-opened consideration that there will be 4 more locations. Waiting on BRIA to name the sites.</p>	5/15/2018	

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<p>Refine the face-to-face “LifeBio Connect Volunteer Training” for volunteers who will conduct the biographical data collection.</p>	<p>P - January - Deliver first onsite “LifeBio Connect” volunteer training at the Solon Senior Center on 1/26/2018. Capture questions and notes from the call to improve next volunteer training on 1/27/2018. Finalize new “About Me Journal” for volunteer use in interviewing, with military question and minor changes to personal preferences language. Order reprinted version to be ready for use of About Me Journals onsite. Modify LifeBio online software to reflect new About Me Journal (1/31/2018)</p> <p>February – Discussed field operations and timing for volunteer recruitment at meeting with Benjamin Rose Institute on Aging, UHCANOhio, and LifeBio on 2/9/2018.</p> <p>March – Delivered onsite Volunteer Training at Jennings Hall (Beth Sanders and Saskia Johantges and Yvonne Oliver). We trained 3 new volunteers. Documented lessons learned afterward such as the importance of them conducting a practice interview with each other.</p>	<p>4/1/2018</p>	
<p>Lead the development of recruitment materials for NFs and residents and ensure all materials are culturally diverse.</p>	<p>C</p>	<p>7/31/2017</p>	<p>7/31/2017</p>
<p>Provide technical assistance to direct care staff and administration and individual facilities via phone, email, monthly webinars, and bimonthly site visits to assist the implementation of the LifeBio intervention.</p>	<p>NP</p>	<p>6/15/2018</p>	
<p>Conduct follow-up communication with NFs for quality assurance and fidelity monitoring of the LifeBio development process.</p>	<p>NP</p>	<p>6/15/2018</p>	
<p>Develop a Life Story Booklet and a one-page laminated Life Story Summary for at least 700, and up to 830, participating residents.</p> <ol style="list-style-type: none"> a. Verify information accuracy, coordinate booklet dissemination and display of Life Story Summary with direct care staff. b. Coordinate the dissemination of documents with direct care staff providing residential services; and, c. Coordinate the display of Life Story Summaries on the door or in a prominent location outside of each participating resident’s room. 	<p>NP</p>	<p>8/30/2018</p>	
<p>In collaboration with GRC, collect performance data to monitor the implementation process and lessons learned.</p>	<p>NP</p>	<p>10/30/2018</p>	
<p>Develop dissemination materials including audiovisual demonstrations of the implementation process of LifeBio in coordination with UHCAN and BRIA.</p>	<p>NP</p>	<p>10/30/2018</p>	
<p>Participate in the development of the final report and dissemination of materials including an audiovisual demonstration product.</p>	<p>NP</p>	<p>12/01/2018</p>	

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UHCAN Ohio			
<p>Work with LifeBio to develop a recruitment plan for volunteers, targeting Cuyahoga and Ashtabula counties.</p>	<p>C – Identified service projects from Case Western Reserve University, John Carroll University, Youngstown State University and Kent State University to recruit students.</p> <p>NP - A share questionnaire with BRIA, LifeBio and UHCAN is being used for the initial nursing facility interview. The questionnaire discussed policies and practices related to NF, resident availability, NF monthly program calendars, and volunteer requirements and a general overview of the research project and timelines.</p>	<p>7/30/17</p>	
<p>Recruit, train, coordinate, and supervise volunteers to collect biographical information using the LifeBio “About Me” interview protocol with residents and family members.</p>	<p>P – The timeline has been adjusted to reflect the time needed to conduct recruitment and data collection in nursing homes before the residents can be interviewed.</p>	<p>1/30/18 4/30/18</p>	
<p>Supervise volunteers to recruit a minimum of 830 NF residents from selected NFs to participate in the LifeBio Pilot Study.</p>	<p>NP</p>	<p>1/30/18 6/30/18</p>	
<p>Assist in tracking performance measures on a weekly basis detailing the progress of volunteers.</p>	<p>P – Shared Google Doc created with BRIA, LifeBio and UHCAN to assist with tracking.</p>	<p>10/30/18</p>	
<p>Contribute to a plan to sustain and expand the LifeBio program to other nursing homes in Ohio as a means of improving quality of care, including an assessment of the feasibility and an itemization of the costs and benefits.</p> <p>a. Feasibility of integrating LifeBio into the intake forms currently utilized by NFs</p> <p>b. Itemization of the costs and benefits associated with implementing LifeBio across Ohio</p>	<p>NP</p>	<p>12/01/18</p>	
<p>Participate in the development of the final report and dissemination of materials including an audiovisual demonstration product.</p>	<p>NP</p>	<p>12/01/18</p>	
<p><input type="checkbox"/> Documents Attached (describe): Revised Timeline</p>			

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Recommended Changes to Project Plan:

Schedule Deliverables Resource Allocation Other

Description: Due to challenges described above, we are proposing several changes to the project plan.

- 1) Move unspent funds from FY2018 to FY2019 to support continued data collection efforts in 2019 and extend the project end date to June 30, 2019.
- 2) Lower our eligibility criteria so that a larger number of residents are eligible to participate in the study, including residents with BIMS scores below 8 who could complete a modified, less extensive, version of the evaluation survey, remove the age criteria, and include residents with less than 90 days stay. This change would potentially double the number of eligible residents per a facility.
- 3) Revise our evaluation design. Use a pre-post intervention design and eliminate the wait-list control group design. This change will allow us to evaluate the impact of the intervention on every resident who participates in LifeBio, rather than limiting the evaluation to those who are randomly selected to an intervention group.
- 4) Recruit additional NFs to participate in the project. One additional facility has agreed to join the project and three more facilities have been invited to join.
- 5) We expect that these changes will allow us to obtain a sample of 400 -600 residents.

Approved by:

Date: