

ASSISTIVE TECHNOLOGY INVITATIONAL ROUNDTABLE

4th Session

*BUILDING A CALIFORNIA ASSISTIVE
TECHNOLOGY INITIATIVE*

February 18, 2010

**Teleconference Locations in
SACRAMENTO and PASADENA, CALIFORNIA**

CO-CONVENERS:

**Independent Living Partnership (ILP)
California Department of Aging (CDA)
California State University, Fullerton (CSUF)**

ASSISTIVE TECHNOLOGY INVITATIONAL ROUNDTABLE

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I. PREVIOUS SESSION OUTCOMES

The **first Assistive Technology (AT) Roundtable** in Sacramento on June 5, 2008 brought together leaders from state government, the assistive technology industry, research institutions, assistive technology associations, and organizations representing older adults and the disability communities. The need for new AT and the application of existing AT to help the target audience maintain independence were discussed. Attendees expressed support for a follow-up session during which the group could further explore opportunities for AT development and application in California.

The **second AT Roundtable** in Fullerton on November 6, 2008 focused on new collaborations that are underway and a structure for the group that would help achieve an agreed upon Mission Statement which reads: "The purpose of the California AT Coalition is to advance the development, testing and use of assistive technology to help those who are aging and the disabled live independently in their homes and to age in place."

Subsequent to the 2nd AT Roundtable numerous meetings took place between the Department of Aging (CDA) and various academic institutions relative to AT development, potential sources of funding to support the Coalition were explored, work began on the development of a web page in which Coalition participants could communicate with each other, a statement listing "Items of Consensus" was developed and distributed to Coalition participants, and all participants were contacted by telephone and asked: A. What is it that your organization feels they must get out of the Coalition in order for it to be a worthwhile endeavor, and B. What two issues do you feel the Coalition should, and can, address with a productive and successful outcome within the next year? A summary of their responses was compiled and distributed to the Coalition participants.

The **third AT Roundtable** was hosted in Sacramento on March 24, 2009, with audio and video hook-ups in Pasadena, CA and Washington, DC. Discussion centered on two areas of Coalition activities: A. Pursuing AT research collaborative projects, and B. Advocacy initiatives. Ultimate objectives of the CATC should be to drive the adoption of new AT research and to encourage more providers to apply the research. Several specific recommendations included:

- A. Bring more viable partners into the CATC, including health insurance partners,
- B. Secure funding for planning,
- C. Clarify the focus of the CATC, and
- D. Continue to meet in this same manner to sharpen our focus.

Subsequent to the 3rd roundtable session, the Independent Living Partnership (ILP) partnered with the California Foundation for Independent Living Centers (CFILC) on a three year grant with the California Department of Rehabilitation (DoR) to undertake two activities related to assistive technology in California. ILP will monitor the activities of the thirteen (13) California

Assistive Technology Exchange (CATE) centers across the state and it will convene the CATC two times each year.

II. PURPOSE OF ASSISTIVE TECHNOLOGY ROUNDTABLE – 4th SESSION

Ray Mastalish, facilitating the session on February 18, 2010, from the AARP office in Sacramento, opened the session by thanking AARP for providing the video and audio hook-up between Sacramento and Pasadena. Unfortunately video contact was lost during introductions and never restored for the remainder of the session. Twenty-two participants continued the discussion via the audio hook-up. The consensus statement was reviewed, an overview of the grant to support future CATC roundtable sessions was given, followed by discussion in the following four activity areas:

- A. Trend Analysis
- B. Kinds of IT Needed
- C. How AT Needs are Met in California
- D. Formulating and Issuing Recommendations

III. DISCUSSION THEMES

A. Conduct a Trend Analysis of California's Aging and Disabled Populations, Including the Social, Health, Economic, Policy, and Regulatory Challenges Created by the Phenomenon

To complete a trend analysis, discussion focused on how to identify existing data, both state and federal. M. Carbine asked coalition members for input on potential sources of data (wanting to utilize existing data rather than create new data banks). Suggestions included the California Strategic Plan on Aging and pre-plan work completed by the University of California-Berkeley; 2005 White House Conference on Aging materials; Olmstead related materials; existing city and county plans; CA Department of Public Health; and the disability network data sources, including the CA State Council on Developmental Disabilities. It was suggested we try to access data from the private sector as well, including the Alliance of Technology Access. Carbine asked all CATC participants to e-mail him potential sources of data.

Once data are compiled, it will be shared with all CATC participants for their review and further input with a report issued prior to the next CATC Roundtable Session. Member reviews should weigh in on the social implications of the data.

It was suggested that the data focus on two areas – what are the chronic diseases that need to be addressed by AT, and what are the functional needs? The report should be focused on how the data can support/be tied to the CATC recommendations that will be made to policy makers as a product of the Department of Rehabilitation (DoR) / California Foundation for Independent Living

Centers (CFILC) grant, including budget process impact and private sector planning.

It was suggested that a committee be formed that could work with staff on the development of this Activity Area. Jorge Lambrinos, Moira Forsythe, Echo Chang, Lisa Mangiante, and Scott Peiffer offered to serve on the committee. A timeline for completion of this activity area will be prepared and shared with the CATC participants.

B. Compile a Projection of the Kinds of Assistive Technology California's Aging and Disabled Residents Will Need in Order to Maintain Their Independence and Remain in Their Own Homes and Communities to the Extent Possible

It was suggested we may find that existing data, particularly from the private sector, already includes an identification of AT needs. From data collected in Activity Area 1 we can determine how many people will have AT needs, what kinds of devices will be needed, and what are the issues related to accessing the appropriate AT. Discussion focused on the fact that there is nothing bringing together the companies involved in developing and marketing AT. M. Saffarti reported that an announcement would be made during the American Society on Aging (ASA) conference in Chicago that a new industry consortium was being formed that would focus on educating the population on the availability and usefulness of AT. P. Abbott suggested that there needs to be communication and cooperation between such an industry group and CATC members, particularly a link with the education community. Saffarti responded that there would be such a link.

It was agreed that this projection of needed AT would be completed following completion of Activity A above.

C. Complete a Review of How the Assistive Technology Needs of California's Aging and Disabled Populations are Currently Being Met, Focusing on Identifying Gaps, Barriers, Challenges and Unmet Needs

An observation was put on the table that while a new industry consortium as mentioned in Activity A above is a good idea, there is still a problem when funds are not available for an "educated" public to purchase affordable needed AT.

It was observed that CA is not very active in meeting the current needs for AT. P. Abbott informed the group that CSUF is building an AT lab bringing together the Gerontology, Engineering, and Social Services Departments. Research will focus on creating prototypes which would be linked to testing "in the real world". Safety standards will be addressed with testing of existing and future products, evaluating their safety and performance. Ultimately, a "Good Housekeeping" Seal

of Approval approach might be used. A. Miller and E. Chang added that a component of the CSUF CATLAB initiative will look at finding solutions to barriers people face in regards to the application of AT. It was stated this CATLAB initiative was born out of past CATC discussions.

Again, it was pointed out that we need to keep in mind the “social environment” of AT. While we might see the development of good AT products, unless they are socially acceptable and user friendly, they will be of questionable value. One avenue of addressing this issue is through communication. A question was raised as to whether this communication link is an appropriate role for CATC?

Another point made by a number of CATC participants was that a barrier to AT application is the lack of funding access for users which is inhibiting private sector willingness to invest in AT research and demonstration. We need cost/benefit analysis of how AT can offset costs in both in-home care and in institutional care. The fact is there are good devices on the market but there are no funds for their purchase. They may not be affordable by many who could benefit from their use and insurance companies do not cover many devices. The initiative at CSUF in which E. Chang is working, will also look into funding solutions to barriers that people face in regards to AT. Several participants suggested that as part of CATC’s data gathering we look at long term care insurance to see if they cover AT items. We need to focus on government guidelines.

Again, it was agreed that this Activity Area would be undertaken following completion of Activity Areas A & B and would include and reflect CATC participant input through future CATC Roundtable Sessions.

D. Issue Recommendations for Policymakers, Regulators and Other Public and Private Sector Leaders on Steps That Can Be Taken to Help the State Meet the Assistive Technology Needs of its Aging and Disabled Populations

Discussion focused on how AT development and application can be an economic engine linked to job development and green energy initiatives in the state. Another participant offered that the message needs to be jobs, jobs, jobs in California. Funding will follow success in making the case for the benefits of an AT economic engine. This could get all of the college and university systems working together.

We will need to include recommendations as to how to finance the purchase of AT products. To formulate recommendations we also need to consider who is the consumer – is it the user, is it a caregiver, or is it a payor, i.e., insurance company? We need to differentiate between “customers” and “caregivers”, more appropriately, between end-users and people making purchasing decisions. It was

noted that in the future, aging boomers will be a greater market for AT related items whether as a caregiver or for themselves.

Another participant observed that those with the greatest need for AT may be those without the means to buy it. We need to look at recommendations regarding affordability and alternative funding sources. We need to make policy makers understand that dollars spent are big dollars saved on less institutionalization.

Another topic for future recommendations should be around the issue of consumer education. One option is for support to post videos on the Internet that give testimonials showing how individuals have used AT to their benefit.

In addition, recommendations need to be targeted to various special interest groups – need to identify appropriate industries.

Still another issue for potential future recommendations may come from the Olmstead related policy whereby Medicare will be addressing functional levels of people in nursing facilities – directly asking people if they want to leave the institution. It will require nursing home referrals to designated entities to assist with re-integration into independent living environments. Eventually this may lead to greater demands for AT devices.

Finally, for internal CATC purposes it was suggested that we need a clearinghouse of information to alert CATC members about the various AT related activities going on in California and elsewhere, as well as potential issues we may want to alert members when advocacy positions may be appropriately taken on AT related issues.

For example, a current issue was put on the table for discussion – input to the reauthorization of the Older American Act. The CA Department of Aging will present testimony including advocating for the inclusion of AT language in the reauthorization. There was agreement that rather than a statement being issued by CATC regarding AT inclusion in the reauthorization of the OAA, that we would find out the best way to provide input, prepare a general statement, and share that with the CATC participants who are then encouraged to send a personalized recommendation to the Administration on Aging.

IV. RECOMMENDED NEXT STEPS

Recommended next steps did not basically change from previous sessions:

A. Bring in a Broader Spectrum of Partners – The Coalition should include additional elected and government officials, additional academic institutions, representatives of the disabled community, and foundations.

- B. Health Insurance Communications Partners** – Kaiser, SCAN, Qualcomm, and other public and private insurers and communications firms should also be at the AT Roundtable.
- C. Develop Timelines For Completion of Activities A - D** – A timeline for accomplishing activity areas A – D should be developed and shared with CATC participants. It was agreed work would start on the first report, it would be circulated among the working group, and then distributed to all CATC members before the fall meeting.
- D. Advocate for Consumer Education** – There was consensus that more education is needed for the public, providers, consumers and caregivers regarding the availability of AT and on how best to utilize AT products.
- E. CATC Focus** – There was consensus that the focus of CATC activities will ultimately be on issuing recommendations to elected and administration officials, AT industry leaders, and funders of AT research and application regarding funding, access, research, and other AT related issues.
- F. Continue to Meet in Same Manner** – The CATC should continue to meet two times per year in this same manner on a timeline established to complete all four Activity Areas (A – D) by July, 2012. In the meantime, as AT related issues arise where CATC advocacy efforts would be appropriate, action will be taken.

APPENDIX

I. PARTICIPANTS / REPRESENTATION

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