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DEPARTMENT OF HEALTH & HUMAN SERVICES

Office of the Secretary

The Assistant Secretary for Planning and Evaluation
Washington, D.C. 20201

March 26, 2001

Lex Frieden
Senior Vice President
The Institute for Rehabilitation and Research
1333 Moursund
Houston, TX 77030

Dear Mr. Frieden:

You are invited to be a panelist at ***Independent Choices: A National Symposium on Consumer-Direction and Self-Determination for the Elderly and Persons with Disabilities.*** This invitational symposium will be held in Washington, DC, at the Loews L'Enfant Plaza Hotel, June 10-12, 2001. The U.S. Department of Health and Human Services (HHS), Office of the Assistant Secretary for Planning and Evaluation is sponsoring the symposium with the Robert Wood Johnson Foundation, AARP, the Substance Abuse and Mental Health Services Administration, the Health Care Financing Administration, and the Administration on Aging. Our goal is to identify future directions for policy development and research and demonstration projects to promote effective and responsible consumer-directed services systems for the elderly and people with disabilities.

We would like you to participate in a panel discussion on the next steps for consumer advocates. You will find a brief description of the workshop and panel discussion topics, as well as the preliminary agenda, in the attached symposium brochure. We anticipate that the audience will include representatives from Federal, state and local governments, associations, advocacy groups, funders, self advocates, research institutions, and consumer-directed providers.

Following the symposium's opening reception and dinner on Sunday, June 10, HHS Secretary Tommy Thompson will introduce Jeb Bush, Governor of Florida, as the keynote speaker. Under the Governor's leadership, Florida has expanded access to in-home and community-based services, particularly for individuals with developmental disabilities, and has pioneered testing new models of consumer-directed care for the elderly and younger persons with physical and/or cognitive disabilities. Florida is participating in the "Cash and Counseling Demonstration and Evaluation" (cosponsored by HHS and the Robert Wood Johnson Foundation), a large-scale test of the feasibility and effectiveness of giving Medicaid patients choice and control over services using a consumer-directed cash allowance.

The symposium presentations, panel discussions and workshops will offer unique opportunities to learn about models of consumer-directed care, to hear from consumers about their experiences in those arrangements, and to discuss and debate the implications of consumer-direction on public and private health and long-term care service delivery systems. Luncheon speakers will be

members of Congress who have sponsored supporting legislation. The symposium will conclude with panel discussions involving consumer advocates and high level Federal and state policymakers who will offer their suggestions about "next steps."

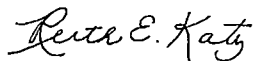
We do not expect full agreement among the invited participants, or even among the presenters. We do expect a thorough airing of all the perspectives. We want your voice to be heard in this discussion.

If you accept this invitation, HHS will waive the registration fee and pay for your travel and accommodations. To confirm your participation, please fax your acceptance to Sharon Leeney of Technical Resources International, Inc. (TRI), at 301-897-7403, or email her at sleeney@tech-res.com. TRI will contact you regarding logistical details. **Space is limited, so take advantage of this opportunity. We must hear from you by April 9, 2001; otherwise, another person will be invited to take your place.** Should you be unable to attend and wish to nominate a replacement, please call or email Sharon Leeney as soon as possible.

You can also visit the symposium website at <http://www-tech-res-intl.com/dhhschoices> for symposium information and online registration. If you have questions, please contact Sharon Leeney.

We look forward to seeing you at the symposium.

Sincerely,



Ruth Katz
Acting Deputy Assistant Secretary for
Disability, Aging and Long-Term Care Policy

Attachment

INDEPENDENT CHOICES



**A National Symposium on Consumer-
Direction and Self-Determination for
the Elderly and Persons with Disabilities**

Do not miss this opportunity to participate in important policy discussions

Attend

this National Symposium, open to a limited number of participants, to:

- examine the available empirical evidence regarding consumer-directed care models;
- discuss the implications of research for policy development and program planning; and
- guide future policy efforts around consumer-direction and self-determination.



Learn

about consumer-directed models and why they are being embraced by states and consumers alike. Medicaid-funded, consumer-directed personal assistance programs are now in effect in 27 states.

Participate

in panel discussions and intensive workshops where you can:

- learn in depth about several different models of consumer-directed care;
- listen to consumers describe their own experiences with these services;
- discuss and debate the implications of consumer-direction and self-determination on public and private health and long-term care delivery systems;
- explore financing and systems design; and
- recommend future steps.



Featured Speakers:

Tommy Thompson

HHS Secretary

Jeb Bush

(invited)

Governor of Florida

Participate in panels, facilitated discussions, and workshops involving consumers, advocates, and high level Federal and state policymakers.

Consumer-Direction/Self-Determination: What is It? Who Benefits? How Widely Available is It?

A series of facilitated panel discussions will provide brief definitions of consumer-direction/self-determination from the perspective of various "stakeholders," an overview of existing consumer-directed programs, and a brief introduction to consumer-directed demonstrations that are currently underway or in the planning stages.

Panel 1: What is "consumer-direction" or "self-determination"?

Panel 2: How widely available are consumer-directed service options?

Panel 3: Ongoing demonstrations/future possibilities for innovation in consumer-direction

Consumer-Direction – What it Means to the Consumer

A facilitated discussion among a panel of consumers participating in Federal/state programs that permit or promote consumer-direction. Consumers and their representatives will talk about how the ability to "self-direct" their services has changed their lives.

Evaluation Research on Consumer-Direction

Intensive Workshops

Quality Assurance for Consumer-Directed Services

Consumer-Employed Workers

The Role of Professionals in Supporting Consumer-Direction

Consumer-Directed Fiscal and Supportive Intermediary Services

Future Directions for Research and Policymaking on Consumer-Direction

A series of three panels in which Federal and state policymakers react to what they have heard and suggest "next steps".

Panel 1: Consumer Representatives

Panel 2: State Policymakers

Panel 3: Federal Policymakers

Consumer-Direction in a Broader Perspective

Sponsor

U.S. Department of Health
and Human Services
Office of the Assistant Secretary
for Planning and Evaluation
Office of Disability, Aging and
Long-Term Care Policy



Co-sponsors

The
Robert Wood
Johnson
Foundation



Administration on
Aging

GENERAL REGISTRATION FORM

INDEPENDENT CHOICES:

A National Symposium on Consumer-Direction and Self-Determination for the Elderly and Persons with Disabilities

June 10-12, 2001

Loews L'Enfant Plaza Hotel, Washington, DC

(Invitee only, please)

Name _____

Title _____

Organization _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

Email _____

Special Requirements: _____

Registration Fee - \$165 *(Registration fee includes all meal functions and all conference materials)*

Please indicate payment method:

☐ Check/Money Order ☐ Visa ☐ Mastercard

Number: _____ Expiration Date: _____

Name of cardholder: _____

Signature: _____

Please attach check or money order, made payable to "TRI"
\$165 posted to credit card will say "Technical Resources International"

You can register online at www.tech-res-intl.com/dhhschoices



Accommodations:

Loews L'Enfant Plaza Hotel
480 L'Enfant Plaza, SW
Washington, DC
202-484-1000

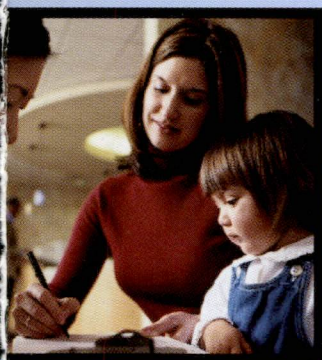
Rate: \$189 plus tax per night

Please contact the hotel directly and mention the Consumer-Directed Care symposium to take advantage of this special rate. Reservations must be made by May 8, 2001.

Transportation:

Metrorail, the Washington area subway system, is convenient for travelers arriving at Reagan National Airport. The hotel is located directly above the L'Enfant Plaza Metro Station on the yellow, green, blue, and orange lines. Use the exit marked 9th and D Streets, SW.

The SuperShuttle offers service from all three local airports at a cost of \$30 from Baltimore/Washington International (BWI), \$22 from Dulles International, and \$9 from Reagan National. To reserve a seat on the shuttle, please call 1-800-258-3826, 24 hours in advance of your flight. Taxi service from Reagan National Airport is approximately \$15; from BWI or Dulles, approximately \$40.



3 Ways to Register

Fax

(301) 897-7400

Mail

TRI, Attn: Sharon Leeney
6500 Rock Spring Drive, Suite 650
Bethesda, MD 20817

On-line

<http://www.tech-res-intl.com/dhhschoices>

Policymakers, service providers, program administrators, researchers, consumers, and advocates will be attending this meeting.

REGISTER NOW!

We want your voice
to be heard in this
important
discussion!

Substitution Policy

Please remember, attendance at this symposium is by invitation only. **You must register by the date shown in your letter of invitation or we will invite another person to take your place.**

To nominate someone to replace you, please send a request electronically to Sharon Leeney at sleeney@tech-res.com.

Cancellation Policy

Cancellation requests must be made in writing and faxed to:

(301) 897-7400

"Independent Choices"
Technical Resources
International, Inc.
Attn: Sharon Leeney

A handling fee of \$75 will be charged for cancellations received by May 21, 2001. Cancellations will not be accepted after that date.



Agenda Overview

Sunday, June 10, 2001

2:00pm — 6:00pm

Registration

6:00pm — 9:00pm

Reception and Dinner

Tommy Thompson - Secretary of HHS

Jeb Bush - Governor, State of Florida (invited)

Monday, June 11, 2001

7:30am — 8:30am

Registration/Continental Breakfast

8:30am — 9:00am

Welcoming Remarks

9:00am — 10:30am

Consumer-Direction/Self-Determination

Panel #1 (9:00am - 9:30am)

Panel #2 (9:30am - 10:00am)

Panel #3 (10:00am - 10:30am)

10:30am — 10:45am

Break

10:45am — 12:00pm

Consumer-Direction

What It Means to the Consumer

12:00pm — 1:15pm

Lunch

1:15pm — 1:30pm

Break

1:30pm — 3:00pm

Evaluation Research on Consumer-Direction

3:00pm — 4:30pm

State Program Administrators' Experiences

Tuesday June 12, 2001

7:30am — 8:30am

Continental Breakfast

8:30am — 9:30am

Consumer-Directed Care Models in Other Countries

9:30am — 9:45am

Break

9:45am — 12:00pm

Intensive Workshops on Selected Topics

I. Quality Assurance for Consumer-Directed Services

II. Consumer-Employed Worker

III. The Role of Professionals in Supporting Consumer-Direction

IV. Consumer-Directed Fiscal and Supportive Intermediary Services

12:00pm — 1:30pm

Lunch

1:30pm — 1:45pm

Break

1:45pm — 3:30pm

Future Directions for Research and Policymaking on
Consumer-Direction

3:30pm — 3:45pm

Break

3:45pm — 5:00pm

Consumer-Direction in Broader Perspective