

# MEDTAPP – LifeBio Pilot Study Project Progress Report

<b>Project Title:</b> LifeBio Pilot Study	<b>Project #</b>		
<p><b>Project Information:</b> 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>			
<b>Submission Date:</b> 07/09/2018			
<p><b>Description of Accomplishments:</b></p> <ul style="list-style-type: none"> <li>- GRC coordinated weekly individual and group meetings with all vendors. GRC monitored the progress of volunteer recruitment, nursing facility field operations, and volunteer and staff training planning, and identified action items for each upcoming week.</li> <li>- GRC received and processed fake and real resident and family survey data and generated reports.</li> <li>- GRC received and approved monthly and quarterly progress reports from all vendors.</li> <li>- GRC approved the protocol for implementing the modified, less extensive version of the evaluation survey and resident and family modified surveys to be used with residents who do not meet the eligibility requirements.</li> <li>- GRC requested and received updated budgets for FY19 from all project vendors.</li> <li>- GRC met with ODM to discuss the progress of the LifeBio Pilot Study and to plan for changes to the project that would expand the resident data pool.</li> <li>- LifeBio took part in weekly project conference calls with project partners and GRC to provide project updates.</li> <li>- LifeBio attended initial site meetings and completed a Staff Trainings. LifeBio continues to lead recruitment efforts for additional sites needed in the project.</li> <li>- LifeBio story team received and processed a total of 30 resident life stories. LifeBio began planning for the second round of staff training and for the presentation of the completed stories to sites.</li> <li>- BRIA took part in weekly project conference calls with project partners and GRC to provide project updates.</li> <li>- BRIA provided input to UHCAN on the identification of local volunteer groups in Ashtabula and Cuyahoga counties.</li> <li>- BRIA continued field operations at recruited NFs.</li> <li>- A pre-post design was created in May and a longitudinal study design in June.</li> <li>- BRIA developed materials for LifeBio staff for the administration of baseline staff surveys prior to LifeBio beginning the staff trainings.</li> <li>- BRIA developed a protocol for implementing the modified surveys and developed instructions for LifeBio staff and UHCAN on administering the modified surveys to residents. With input from GRC, BRIA developed and pilot tested all surveys and provided materials for the modified surveys to be mailed to LifeBio staff.</li> <li>- BRIA developed an IRB modification proposal to accommodate for the implementation of the modified surveys.</li> <li>- BRIA scheduled and led introductory meetings with liaisons and administrators in 17 nursing homes, Time 1 (T1) Baseline data collection with 10 sites for a total of 153 resident interviews.</li> <li>- UHCAN took part in weekly project conference calls with project partners and GRC to provide project updates.</li> <li>- UHCAN collaborated with BRIA and LifeBio to conduct introductory NF's meetings in Cuyahoga and Ashtabula counties.</li> <li>- UHCAN trained a total of 24 volunteers.</li> <li>- UHCAN coordinated and supervised the beginning of interviews in five NFs.</li> </ul>			
<p><b>Emerging/Pending Issues</b> (that could impact schedule, scope or resources): <b>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. Considerably fewer residents per a facility meet eligibility criteria (BIMS score of 8 or higher, 60 years of age, long-stay) and have consented to participate in the project. A modified, less extensive version of the evaluation survey is being conducted with all residents who do not meet the eligibility requirements and consent to participate.</b></p>			
<b>Action Steps for Scope of Work/ Deliverables</b>	<b>Status and Description</b> (C= completed, P = progress, NP = no progress)	<b>Target Date</b>	<b>Completion Date</b>
GRC received, reviewed, and approved quarterly report for UHCAN April 6, 2018.	C	4/6/18	4/6/18
GRC received, reviewed, and approved quarterly report for BRIA on April 8, 2018.	C	4/8/18	4/8/18
GRC sent BRIA a report on the fake survey data on April 9, 2018.	C	4/9/18	4/9/18
GRC received the first batch of resident surveys from BRIA on April 17, 2018.	C	4/17/18	4/17/18
GRC received, reviewed, and approved a monthly report from LifeBio for the month of March on April 23, 2018.	C	4/23/18	4/23/18
GRC met internally to plan for the receipt and scanning of resident, family, and staff surveys on April 23, 2018.	C	4/26/18	4/26/18

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GRC met with ODM to discuss the progress on LifeBio and the contract on May 4, 2018.	C	5/4/18	5/4/18
GRC received a draft proposal for the implementation of the modified, less extensive version of the evaluation survey from BRIA on May 8, 2018.	C	5/8/18	5/8/18
GRC received a revised draft proposal for implementation of the modified evaluation survey and a draft post-test questionnaire from BRIA on May 11, 2018. Feedback	C	5/11/18	5/11/18
GRC processed the first batch of survey data and sent a report to BRIA on May 22, 2018.	C	5/22/18	5/22/18
GRC received a field operations overview, NF participant numbers update, and resident and family draft modified surveys on May 23, 2018.	C	5/23/18	5/23/18
GRC met internally to discuss the implementation of the modified surveys on May 24, 2018.	C	5/24/18	5/24/18
GRC met with BRIA to discuss the past week's progress and identify action items for the upcoming week on May 25 and June 7.	C	5/25/18	5/25/18
GRC met with UHCAN to discuss the past week's progress and identify action items for the upcoming week on May 25 and June 8.	C	5/25/18	5/25/18
GRC provided feedback on the post-test questionnaire and resident and family draft surveys to BRIA on May 29, 2018.	C	5/29/18	5/29/18
GRC received a draft PowerPoint slide from LifeBio on HIPPA for staff trainings on June 4, 2018.	C	6/4/18	6/4/18
GRC held a conference call with BRIA to discuss the implementation of the modified surveys on June 5, 2018.	C	6/5/18	6/5/18
GRC received the revised family and resident modified surveys from BRIA on June 5, 2018.	C	6/5/18	6/5/18
GRC provided feedback on the draft PowerPoint slide from LifeBio on HIPPA for staff trainings on June 5, 2018.	C	6/5/18	6/5/18
GRC met with LifeBio to discuss the past week's progress and identify action items for the upcoming week on May 24 and June 6.	C	6/6/18	6/6/18
GRC received additional survey data from BRIA on June 1 and 8, 2018.	C	6/8/18	6/8/18
GRC requested updated budgets for FY19 from all vendors on June 12, 2018.	C	6/12/18	6/12/18
GRC spoke with BRIA about the FY19 budget request on 6/13/18.	C	6/13/18	6/13/18
GRC received, reviewed, and approved monthly reports from LifeBio for the months of April and May on June 14, 2018.	C	6/14/18	6/14/18
GRC received an updated budget for FY19 from LifeBio and UHCAN on June 15, 2018.	C	6/15/18	6/15/18
GRC held a call with BRIA to discuss the process for the collection of the modified survey data and to clarify GRC's request for the BRIA FY19 budget on June 18, 2018.	C	6/18/18	6/18/18
GRC finalized fiscal documents for FY19 for LifeBio and UHCAN on June 18, 2018.	C	6/18/18	6/18/18
GRC received the final family and resident modified surveys from BRIA on June 8, 2018.	C	6/18/18	6/18/18
GRC received an updated budget for FY19 from BRIA on June 18, 2018.	C	6/18/18	6/18/18
GRC finalized fiscal documents for FY19 for BRIA on June 19, 2018.	C	6/19/18	6/19/18
GRC received a written update from BRIA on their weekly progress on the project on May 18 and June 21, 2018	C	6/21/18	6/21/18
GRC facilitated conference calls with BRIA, UHCAN, and LifeBio to discuss project progress and plan for future activities on April 3, April 17, May 1, May 18, May 31, June 12, and June 26.	C	6/26/18	6/26/18

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GRC received a final fiscal report from BRIA on June 29, 2018.	C	6/29/18	6/29/18
<b>LifeBio</b>			
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>P: April – Four new sites were identified by BRIA: Broadway Care Center, Cedarwood Plaza, Pinegrove, and Andover Village. Informational packets, emails and calls were placed to all new sites. Andover Village declined to participate.</p> <p>May – Three new sites were identified by BRIA: Lake Pointe, Rae-Ann Geneva, and Life Care Center. Informational packets, emails and calls placed to all new sites.</p> <p>Broadway Care Center and Cedarwood Plaza accepted participation in the study. Pinegrove declined to participate.</p> <p>June – Sent emails and made phone calls to Lake Pointe Rehab and LifeCare Center of Westlake to recruit them.</p>	8/31/2018	
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>P: April – Staff training conducted at Franklin Plaza</p> <p>May – Staff training conducted at Falling Water, Rae-Ann Westlake, and Algart.</p> <p>June – Staff training conducted at Lutheran Home, Stratford Care Center, Jennings, and University Manor.</p>	9/30/2018	
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>P: Prepared for first staff training scheduled at Franklin Plaza on 4/9/2018.</p> <p>April – Staff training conducted at Franklin Plaza.</p> <p>May – Staff training conducted at Falling Water, Rae-Ann Westlake, and Algart.</p> <p>June – Staff training conducted at Lutheran Home, Stratford Care Center, Jennings, and University Manor.</p>	9/30/2018	
In collaboration with each NF, identify an activity director and administrator to complete required activities.	<p>P: May – Identified administrator/liaison for Broadway Care Center and Cedarwood Plaza.</p> <p>June – Ongoing as new sites are added.</p>	8/31/2018	
In collaboration with each NF, identify one main contact from each participating organization who will take responsibility for communication with participating LifeBio staff, BRIA, UHCAN, and GRC (as required).	<p>P: March – Re-opened consideration, as there will be four more NFs added to the study.</p> <p>April – Ongoing as new sites are added.</p> <p>May – Ongoing as new sites are added.</p> <p>June – Ongoing as new sites are added.</p>	8/31/2018	
Refine the face-to-face “LifeBio Connect Volunteer Training” for volunteers who will conduct the biographical data collection.	C: May – Completed trainings at participating sites.	5/7/2018	5/7/2018
Lead the development of recruitment materials for NFs and residents and ensure all materials are culturally diverse.	C	5/31/2017	5/31/2017
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.	NP	10/31/2018	
Conduct follow-up communication with NFs for quality assurance and fidelity monitoring of the LifeBio development process.	NP	10/31/2018	

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Develop a Life Story Booklet and a one-page laminated Life Story Summary for at least 700, and up to 830, participating residents. <ul style="list-style-type: none"> <li>a. Verify information accuracy, coordinate booklet dissemination and display of Life Story Summary with direct care staff.</li> <li>b. Coordinate the dissemination of documents with direct care staff providing residential services; and,</li> <li>c. Coordinate the display of Life Story Summaries on the door or in a prominent location outside of each participating resident's room.</li> </ul>	P: June – The first 30 resident life story booklets were received; booklets and one-page laminated Life Story Summaries (“Snapshots”) created for all 30.	8/30/2018	
In collaboration with GRC, collect performance data to monitor the implementation process and lessons learned.	NP	10/30/2018	
Develop dissemination materials including audiovisual demonstrations of the implementation process of LifeBio in coordination with UHCAN and BRIA.	NP	10/30/2018	
Participate in the development of the final report and dissemination of materials including an audiovisual demonstration product.	NP	12/01/2018	
Submit a final fiscal report by June 30, 2018.	C	6/30/2018	6/30/2018
<b>Benjamin Rose Institute on Aging (BRIA)</b>			
In collaboration with GRC, develop and submit an IRB.	C: Project was initially submitted to OSU's IRB in July, 2017; final approval as 'work for hire' was received in December 2017. BRIA submitted the project to its IRB and received approval on 1/11/18. A modification request was submitted and received approval on 3/23/18.	5/5/17	1/11/18 and 3/23/18
Establish a Data Use Agreement to access MDS data.	C: Data Use Agreements in place between all partners.	5/5/17	7/14/2017 and 1/22/2018
In collaboration with LifeBio, GRC, Ohio Department of Medicaid (ODM), and advisory group members, develop and implement an outreach strategy to recruit NFs that provide care for at least 830 eligible residents to participate in the LifeBio Pilot Study.	C	5/30/17	4/25/2017
Establish final study questions and provide them to ODM and GRC for review and approval.	C: BRIA designed modified resident, staff and family surveys and received approval from GRC.	5/30/17	5/5/2017; and 6/6/2018
Using MDS data, develop a detailed study protocol and analysis strategies, including a pre-post wait-list control study design, in collaboration with Ohio Colleges of Medicine Government Resource Center (GRC) to evaluate the impact of participation in LifeBio Pilot Study.	C: Design was changed to a pre-post design in May, 2018 and is now to a longitudinal design.	5/5/17	5/5/2017; 5/30/2018; and 6/20/2018
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.	NP	12/31/18	
Collect baseline data on a staggered basis with residents, family and staff.	P: BRIA has started baseline collections (T1) in nursing homes and as of 6/27/2018 has completed resident interviews in 10 out of 20 nursing homes. Staff and family T1 surveys are also being collected.	8/30/18	
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 has collected information from liaisons and staff regarding issues related to implementation of project that will be used in the plan and assessment.	12/30/2018	
Lead the development of the final report and dissemination of materials including an audiovisual demonstration product.	NP	12/31/2018	
Submit a final fiscal report by June 30, 2017, June 30 2018, and December 31, 2018.	P: FY annual reports for 2017 and 2018 submitted	12/31/18	

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United Health Care Action Network (UHCAN)			
Work with LifeBio to develop a recruitment plan for volunteers, targeting Cuyahoga and Ashtabula counties.	C: Identified volunteers from community based health and senior centers, NF volunteers, Cleveland Jewish Federation 'IMPACT' volunteer program for adults 50 years and older, and academic institutions.	5/1/2018	6/30/2018
Recruit, train, coordinate, and supervise volunteers to collect biographical information using the LifeBio "About Me" interview protocol with residents and family members.	C: May 14, 2018 - Five community volunteers were trained. June 5 -7, 2018 - Training was conducted for volunteers from Cleveland Jewish Federation. June 6, 2018 - One volunteer from Royal Oak was trained. Worked with LifeBio to develop a process for volunteers to return Life Bio booklets following completion of the interviews to LifeBio.	5/14/2018	6/7/2018
Supervise volunteers to recruit a minimum of 830 NF residents from selected NFs to participate in the LifeBio Pilot Study.	P: Twelve volunteers have been assigned to conduct interviews at participating NFs. Thirty interviews have been completed and returned to Life Bio. Volunteers will be reassigned to facilities to complete the remaining interviews. -Franklin Plaza – one volunteer assigned, interviews conducted 5/21/18 -Falling Water - three volunteers assigned, interviews conducted 6/12/2018 - Algart Health Services - four volunteers assigned, interviews conducted 6/14-15/2018 -Rae-Ann Westlake - three volunteers assigned, interviews conducted 6/19/2018 -Stratford Rehabilitation - five volunteers assigned, interviews conducted 6/22-25/2018	5/21/2018	9/30/2018
Assist in tracking performance measures on a weekly basis detailing the progress of volunteers.	P: Shared Google Doc created with BRIA, LifeBio and UHCAN to assist with project tracking. Additional tracking documents have been created to assist with volunteer assignments.	4/30/2018	12/2/2018
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.  a. Feasibility of integrating LifeBio into the intake forms currently utilized by NFs b. Itemization of the costs and benefits associated with implementing LifeBio across Ohio	NP	6/5/2018	12/2/2018
Participate in the development of the final report and dissemination of materials including an audiovisual demonstration product.	NP	12/01/18	
Submit a final fiscal report by June 30, 2017, June 30, 2018, and December 31, 2018.	P: FY17 report submitted FY18 report submitted	6/30/17 6/30/18 12/30/18	
<input type="checkbox"/> <b>Documents Attached (describe):</b>			

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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: