

Oregon Standards for Options Counselors

Job Tasks

I. Determine the need for Options Counseling

1. Gather information from consumers, family members, and others that the consumer would like involved using informal, conversational approaches
2. Gather information from consumers about their wants, preferences, goals, and willingness to engage in options counseling
3. Evaluate information gathered to determine whether criteria for options counseling are met (e.g., The presenting issue or concern is not resolved with a single conversation or exchange; consumer needs assistance to think through the situation or to contact professionals or other agencies; a family meeting (can include friends, professionals from other agencies) and/or in-home visit is needed to gather more complete information about needs, values, and preferences and/or to support consumer decision-making.

II. Assess needs, values, and preferences

4. Meet with consumers (by phone or in person) to learn more about their situations and the issues confronting them (e.g., day-to-day routines to determine how they are currently managing; preferences about where to live, their visions for the future, their feelings related to independence and using services).
5. Arrange and conduct meeting with the consumer and with family members or other parties they would like to have present (such as close friend, pastor, neighbor) as needed to facilitate assessment of consumer needs
6. Identify existing consumer resources (e.g., including financial, family and other natural support, housing environmental safety).
7. Identify the consumer's preferred approach to making decisions to ensure that assessments and action plans will reflect this preference.
8. Determine consumer's level knowledge about options.
9. Document the consumers' and OCs' perspectives of needs, values, and preferences.
10. Identify key decision makers (e.g., consumer, family, or other support person).
11. Learn about specific consumer disabilities (e.g., Lewy Body Dementia) to better understand consumer needs.

III. Understand public and private sector resources

12. Identify local resources available to address unmet needs of adults and people with disabilities at all income levels using the ADRC database, consulting with colleagues and community partners.
13. Increase OCs' own knowledge of local and regional private and public sector resources to assure the full range of options are offered to consumers
14. Provide and review written information (e.g., brochures, applications, contact information, websites) to consumers, family members and/or other support persons about relevant aging and disability services.
15. Increase knowledge of agency and community healthy living, fall prevention, and wellness programs.
16. Facilitate access to services (e.g., help consumers complete applications, make initial calls to services as needed)

17. Participate in updating the ADRC resource data base by identifying gaps in services, contributing updated information about resources, and providing feedback to IT.
18. Attend training on public and private resources to increase and maintain knowledge and skills using in-service, workshop, and webinar training opportunities.
19. Build relationships with community partners to better understand services available and to share information about ADRC services using opportunities for networking and continuing education.

IV. Demonstrate respect for self determination

20. Listen to consumers and families and recognize their unique needs and circumstances.
21. Explain pros and cons of various options to consumers and support persons to facilitate decision making.
22. Support and advocate for consumer decisions about services and supports even if decisions do not seem appropriate according to one's professional training.
23. Develop action plans with consumers that support their decisions.
24. Record action plans, documenting needs, values, and preferences and the roles and responsibilities agreed to by consumers, support persons, OC, and others.
25. Explain the role of options counselor to consumers and support persons to set clear expectations and to emphasize to all participants the role of the consumer as decision maker.
26. Set ground rules for family meetings and emphasizing consumer direction.

V. Encourage a future orientation

27. Ask consumers for permission to call back and see how action plans are working.
28. Assess consumer readiness for discussing future plans.
29. Work with consumers and support persons to identify possible events or conditions that will trigger additional planning and/or other actions to help consumers and support persons think beyond the current situation.
30. Provide healthy living and disease prevention information and encourage future contact with the ADRC.
31. Leave contact information (business cards and other print material) with consumers and support persons to encourage further contact with the OC if additional questions or needs emerge.

VI. Follow up

32. Call consumers or support persons according to the agreed upon, individualized timeframe to determine how well the action plan is working.
33. Revise action plans as needed to meet consumer needs, preferences, and values using assessment and communication skills; arrange additional services (e.g., family meeting, new referrals) identified through follow up to assist consumers to receive needed and preferred services using knowledge of public and private resources.
34. Document information from the follow up calls.

Minimum Job Qualifications

- 2-4 years of college or equivalent experience (e.g., 2 years related experience for each year of college)
- 3-5 years of experience working with senior and/or people with disabilities.

- Specialized training in options counseling within six months of hire

Job Requirements: Knowledge, Skills, Abilities, & Other Traits

Knowledge about disabilities and aging. *How disabilities affect function and daily life, basic understanding of chronic illnesses and disabilities and associated, expected trajectories.*

Knowledge about practice standards to support consumer direction. *Principles of consumer direction, person-centered planning, person-centered thinking; balancing consumer direction and risk.*

Knowledge about resources – what they are & how to access. *Knowledge about private and public resources, eligibility criteria for public & private resources, how to seek out resources (e.g., databases, websites, networking).*

Knowledge about agency policies, rules, guidelines, protocols. *Criteria for options counseling; agency protocols (e.g., for documentation, holding family meetings, making referrals).*

Writing skills. *Writing action plans and other documents.*

Oral communication skills. *Skilled in active listening, motivational interviewing, presenting information clearly to consumers and other support persons. Understand when and how to match information appropriately to consumer needs, preferences, and capacity.*

Cultural competence. *Ability to interact in respectful, culturally appropriate ways. Identify consumers' strengths and challenges. Awareness of individual differences within and across cultural groups. Self-awareness of one's own cultural competence.*

Ability to facilitate family meetings. *Open and receptive; ability to encourage sharing of concerns, empowering participants to take part in planning, ability to model consumer direction and decision support.*

Interpersonal skills *Openness, creativity, work as a team member, flexibility, curiosity, ability to build rapport, ability to work with people in crisis.*

Assessment skills—gathering information in support of OC *Assess (i.e., “discover”) needs, values, preferences, strengths, challenges; determine how clients manage day-to-day activities; individualize approach to gathering information, using more formal assessment tools selectively and as appropriate.*

Critical thinking & judgment. *Determine whether OC is needed, whether to hold a family meeting, which resources are appropriate, whether consumers and support persons are able to follow through on action plans, when to follow up, when services beyond OC are needed (e.g., case management).*

Observational skills. *Ability to determine through observation consumer capabilities, living environment, strengths and vulnerabilities.*

Time Management skills. *Ability to multitask and prioritize time effectively.*

Computer skills. *Ability to use computer to locate resources; document OC activities; and communicate with peers, consumers, and family members, and other support persons.*

WORK STYLES (OTHER TRAITS)

This job requires:

1. Being honest and ethical.
2. Being reliable, responsible, and dependable, and fulfilling obligations.
3. Being sensitive to others' needs and feelings and being understanding and helpful on the job.
4. Displaying a good-natured, cooperative attitude.
5. Willingness to offer opinions and suggestions for improving OC services.
6. Accepting criticism and dealing calmly and effectively with high stress situations.
7. Willingness to take on responsibilities and challenges.
8. Maintaining composure, keeping emotions in check, controlling anger, and avoiding aggressive behavior, even in very difficult situations.
9. Being open to change (positive or negative) and to considerable variety in the workplace.
10. Being a change agent to assist the agency in developing the ADRC and options counseling services.
11. Being careful about detail and thorough in completing work tasks.
12. Persistence in the face of obstacles.
13. Preferring to work with others rather than alone, and being personally connected with others on the job.
14. Analyzing information and using logic to address work-related issues and problems.
15. Job requires creativity and alternative thinking to develop new ideas for and answers to work-related problems.