

# SAMPLE

## Memorandum of Understanding Between the [Name of Tribe] and the [Name of ADRC]

### I. PURPOSE

The following is an agreement between the [Name of Tribe here] (Tribe) and the Aging and Disability Resource Center of [ADRC name here] (ADRC).

The purpose of this Memorandum of Understanding (MOU) is to define the roles, responsibilities and procedures for collaboration between the Tribal Aging and Disability Resource Specialist (Tribal ADRS) and the Aging and Disability Resource Center.

The period of this agreement begins on [date] and continues until amended or terminated.

### II. ROLES AND RESPONSIBILITIES

#### Service Provision

Services to be provided by the Tribal ADRS. The Tribal ADRS will provide the following services to members of the [name of Tribe].

1. Marketing and outreach to inform tribal members about services available through the Tribal ADRS and the ADRC.
2. Basic information and assistance and options counseling for tribal members.
3. Short term service coordination to help tribal members deal with immediate needs, to the extent time and funding allow.
4. Service as a liaison and customer advocate to tribal members referred to area ADRCs for more in-depth information and assistance, options counseling, and enrollment in publicly funded long term care, including both managed care and IRIS.
5. Home visits for tribal members on behalf of the ADRC.
6. Assistance in preparing materials needed to determine financial eligibility.

Services to be provided by the ADRC. The ADRC is responsible for providing the following services to tribal members in its service area:

1. Disability benefit specialist services.
2. Administration of the long term care functional screen, enrollment/disenrollment counseling and assistance with processing enrollment to access publicly funded long term care, unless the Tribe chooses to have these services provided by the Tribal ADRS.
3. Information and assistance, options counseling and any other ADRC service when needed to complement or augment services provided by the Tribal ADRS.
4. Any other ADRC service that may benefit the consumer or which the consumer requests.

Additional services to be provided by the Tribal ADRS at the option of the Tribe. In addition to the services identified above, the Tribal ADRS will provide those services which are indicated by a check mark on the following list:

- Administration of the long term care functional screen. In order to administer the screen, the Tribal ADRS must complete the Department-required training, be certified to conduct the screen, and follow all screen-related policies and procedures.
- Referral of tribal members to the appropriate economic support unit for financial eligibility determination and enrollment in publicly funded long term care.
- Enrollment counseling for tribal members needing publicly funded long term care services.
- Disenrollment counseling.

### **Referrals**

The Tribal ADRS will refer tribal members to the ADRC for those services which are not available from the Tribal ADRS and when additional assistance is needed beyond that which the Tribal ADRS is able to provide.

The ADRC may refer customers to the Tribal ADRS for:

- Assistance with communications between ADRC staff and the tribal member. This may include involving the Tribal ADRS in meetings between ADRC staff and the tribal member.
- Home visits in connection with information and assistance, options counseling or any other ADRC function.
- Individual advocacy.

### **Information Sharing**

Resource Data Base. The Tribal ADRS and the ADRC will share information about services, providers and resources. The Tribal ADRS will inventory the health and long term care related resources that are available through tribal governments, and share this information with the ADRCs for inclusion in the resource data base. The Tribal ADRS will provide the ADRC with updated information to maintain its resource data base on an ongoing basis. The ADRC will make its resource data base and public information materials available for the Tribal ADRS to use in providing information and assistance, options counseling and enrollment counseling.

Client Tracking. The ADRC will make its client tracking software and system available for use by the Tribal ADRS, so that they can jointly access and maintain records when serving the same individual. The ADRC and Tribal ADRS will access each other's client information only as needed to serve a shared customer and shall respect client confidentiality at all times.

Unmet Needs. The Tribal ADRS and the ADRC will work collaboratively to identify the services provided to and unmet needs of tribal elders and tribal members with disabilities and will share this information with the Wisconsin Department of Health Services and the regional long term care advisory committee, as appropriate.

**Reporting**

The Tribal ADRS and the ADRC shall prepare reports, correspondence and other documentation as required by the Department of Health Services and, where appropriate, shall provide each other with information for inclusion in the required reporting.

**Training**

The Tribal ADRS and the ADRC will provide information about and orient one another regarding their respective governmental and organizational frameworks, services and philosophies. The ADRC will train the Tribal ADRS on its mission, services, information systems and other operations, and will make any training it provides to its own staff available to the Tribal ADRS. The Tribal ADRS will provide or arrange training for ADRC personnel on cultural competence in working with tribes and tribal members.

**Collaborate on Education, Outreach and Community Events**

The Tribal ADRS will develop culturally appropriate informational materials for his/her use in working with tribal members and shall make these available to the ADRC.

The ADRC and the Tribal ADRS will collaborate on community events and outreach for elders and people with disabilities and will jointly participate in educational activities in the tribal or larger community when mutually agreeable.

This agreement shall be reviewed annually and may be revised upon the mutual concurrence of both parties. The agreement shall remain in effect until revised or until terminated by either party.

\_\_\_\_\_  
*[Place Tribal representative name and title here]*  
*[Insert name of Tribe here]*

\_\_\_\_\_  
Date

\_\_\_\_\_  
*[Place name of ADRC Director here]*  
*[Insert ADRC name here]*

\_\_\_\_\_  
Date

Effective: *[Place date here]*  
Revised: *[Place date here]*