A New Standard of Innovation: Findings from the I&R/A Technology Survey

Aging and Disability I&R/A Technology Short Survey
A Quick Introduction to the National I&R Support Center

The National I&R Support Center provides training, technical assistance, and information resources to build capacity and promote continuing development of aging and disability information and referral services nationwide.

- Technical Assistance and Training Webinars
- Online Training (www.advancingstatesiq.org/); AIRS Certification Training; and CRS-A/D Training Resources (train-the-trainer initiative)
- Distribution list for sharing information and resources (to sign up, visit www.advancingstates.org/community-opportunities/stay-informed)
- Surveys of the Aging and Disability I&R/A Networks (like the technology survey that we are presenting today)
- Training events at national conferences (Join us at the National HCBS Conference this December!)
I&R/A Technology Survey: Capturing Pandemic-Related and Longer-Term Developments

In the field in April 2021.

Respondents:

- Area Agency on Aging (AAA): 30%
- Center for Independent Living (CIL): 25%
- State Agency Aging (and/or Disability): 17%
- Aging and Disability Resource Center (ADRC): 16%
- Other Non-Profit Organization: 7%
- Other: 4%
- 211: 1%

N=168
I&R/A Technology Survey: Reflecting Rural and Urban Communities

Respondents by Service Area

- Rural area: 40%
- Large urban area: 25%
- Small urban area: 20%
- Statewide: 15%
- Other: 10%
- National: 5%
- Frontier area: 0%
Aging and Disability I&R/A Technology
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Pandemic-Related Changes and Innovations
I&R/A Modes of Service Delivery: Traditional and New

Modes of Service Delivery

Frequently  Some of the time  Rarely  Never  Not during the pandemic

- Over the telephone
- Over email
- By mail
- Over video conferencing
- By fax
- Over online chat
- In person at service site
- In person at community events
- Over text messaging
- In person at consumer’s home or other location chosen by the person
- In person at a health care setting

Percent of Respondents (N=166)
I&R/A Modes of Service Delivery: Text and Chat

Since the pandemic began
- 38%
- Between two to three years
- 9%
- Less than one year
- 13%
- Between one to two years
- 17%
- Over three years
- 23%
- n=53

Years Providing I&R/A Services by Text

Since the pandemic began
- 50%
- Between two to three years
- 9%
- Less than one year
- 8%
- Between one to two years
- 12%
- Over three years
- 21%
- n=58

Years Providing I&R/A Services by Chat
I&R/A Modes of Service Delivery: Impacts of Pandemic on Call Volume

Call Volume Since Around March 2020
- The number of calls is increasing: 67%
- The number of calls is about the same: 23%
- The number of calls is decreasing: 7%
- Do not know: 3%

N=163

Percent of Call Volume Increase
- More than 10%: 44
- More than 30%: 34
- More than 50%: 16
- More than 100%: 12

n=106
Connecting through Social Media: More Than Ever and In New Ways
Connecting through Social Media: More Engagement and Activities

• Using **Facebook Live** for events; sessions with caregivers; educational and wellness classes
• We completed two area plan public hearings by Facebook Live as well as a health promotion series
• More callers are finding the agency through social media; **more contacts from individuals** on social media (who are connected to I&R for follow up); more individuals reaching out through messenger to inquire about assistance
• Using social media to **disseminate information quickly**; provide service notifications; connect people to pandemic resources
• Added **YouTube** for recorded programs and videos
• Offering **social group activities** on social media and Zoom
• Answering general inquiries
• **Engaging with consumers more.** Prior to the pandemic, social media was mostly used for outreach. Since the pandemic, we have also been using it to organize and engage consumers in online support groups and fun activities as well as spread awareness about local COVID-related resources
• Folks have been more engaged on social media…commenting, sharing, and liking posts
Connecting through Social Media: Facebook and Beyond

Social Media Sites Used

<table>
<thead>
<tr>
<th>Social Media Site</th>
<th>Percent of Respondents (n=140)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>120%</td>
</tr>
<tr>
<td>Twitter</td>
<td>40%</td>
</tr>
<tr>
<td>YouTube</td>
<td>30%</td>
</tr>
<tr>
<td>Instagram</td>
<td>20%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>2%</td>
</tr>
<tr>
<td>TikTok</td>
<td>1%</td>
</tr>
</tbody>
</table>
I&R/A Service Provision During COVID: A Transformational Change to Remote Work

Proportion of I&R/A Specialists Who Work Remotely

- 100% of specialists are now remote (n=71)
- About 75% of specialists are remote (n=23)
- Around 50% of specialists are remote (n=24)
- A few specialists are remote (n=12)
- About 25% of specialists are remote (n=3)

Expectations for Remote Work Looking Ahead

- The organization will maintain some staff working remotely (33%)
- The organization plans to return to staff working from the office as prior to COVID (25%)
- The organization will return to telework options as existed before the pandemic (12%)
- Other (20%)

N=133

The organization will maintain some staff working remotely (33%)

N=135
I&R/A Service Provision During COVID and Beyond: Bringing On New Technologies

- **Organizations that Brought on New Technologies for Engaging with I&R/A Staff**
  - Yes: 46%
  - No: 45%
  - Do not know: 9%

- **Organizations that Brought on New Technologies for Engaging with Clients**
  - Yes: 42%
  - No: 50%
  - Do not know: 8%

- N=159

- N=157
I&R/A Service Provision During COVID and Beyond: New Technologies for Engaging with I&R/A Staff
## New Technologies for Engagement

<table>
<thead>
<tr>
<th>Staff Engagement</th>
<th>Client Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Communication/Video Conferencing:</strong></td>
<td><strong>Communication:</strong></td>
</tr>
<tr>
<td>• Zoom; Microsoft Teams; Google chat; Remo; Ring</td>
<td>• Google Meets; WebEx; Zoom; Blue Jeans</td>
</tr>
<tr>
<td>Central</td>
<td></td>
</tr>
<tr>
<td><strong>Hardware:</strong></td>
<td><strong>Devices:</strong></td>
</tr>
<tr>
<td>• Webcams; computer equipment; phones; headsets</td>
<td>• GrandPads; iPads; Tablets; wifi cards</td>
</tr>
<tr>
<td><strong>Training:</strong></td>
<td><strong>Administrative:</strong></td>
</tr>
<tr>
<td>• Learning Management systems; Thinkific; Zoom;</td>
<td>• Digital forms and online signature tools</td>
</tr>
<tr>
<td>Microsoft Teams</td>
<td></td>
</tr>
<tr>
<td><strong>File Sharing:</strong></td>
<td><strong>Scheduling:</strong></td>
</tr>
<tr>
<td>• SharePoint; OneDrive</td>
<td>• OnceHub</td>
</tr>
<tr>
<td><strong>Project Management:</strong></td>
<td></td>
</tr>
<tr>
<td>• Meister Task</td>
<td></td>
</tr>
<tr>
<td>• Asana</td>
<td></td>
</tr>
</tbody>
</table>
Aging and Disability I&R/A Technology
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Longer-Term Developments with Technology
I&R/A Technology Survey: The Resource Database

Agencies that Maintain a Resource Database

Percent of Respondents (N=162)

- Yes: 70%
- No: 10%
- Other: 5%
- My agency's resource database is in development: 11%
- Do not know: 4%

My agency's resource database is in development
### Making the Resource Database Available to the Public

<table>
<thead>
<tr>
<th>Resource Databases Available to the Public</th>
<th>Percent of Respondents (n=111)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, an online, searchable resource database is available to the public</td>
<td>46%</td>
</tr>
<tr>
<td>Yes, an online resource directory or list is available to the public</td>
<td>25%</td>
</tr>
<tr>
<td>Yes, a print directory is available to the public</td>
<td>25%</td>
</tr>
<tr>
<td>No</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>A public database/directory is in development</td>
<td>5%</td>
</tr>
<tr>
<td>Do not know</td>
<td>0%</td>
</tr>
</tbody>
</table>

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**Legend:**
- Yes, an online, searchable resource database is available to the public
- Yes, an online resource directory or list is available to the public
- Yes, a print directory is available to the public
- No
- Other
- A public database/directory is in development
- Do not know
Resource Database Alternatives

Products or Systems Used to Access Information When Agencies Don’t Maintain a Database

- Google searches
- Local resource guide(s)
- Professional relationships
- A 211 resource database
- Other
- A binder with resources
- Aunt Bertha
- A Word document
- A spreadsheet (e.g. Microsoft Excel)
- A print directory
- A statewide resource database
- Another organization’s resource database

Percent of Respondents (n=18)
# Managing Community Resource Information During the Pandemic

<table>
<thead>
<tr>
<th>Internal</th>
<th>External (Public, Partners)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Communication:</strong></td>
<td><strong>Communication:</strong></td>
</tr>
<tr>
<td>• Regular meetings to update fluid resources; newsletters; e-blasts</td>
<td>• Taskforces, email, video meetings, phone outreach with partners/agencies to stay on top of service changes</td>
</tr>
<tr>
<td><strong>COVID Resource Lists:</strong></td>
<td><strong>COVID Resource Lists:</strong></td>
</tr>
<tr>
<td>• COVID-related resource lists, folders, topics, and guides for staff; vaccination lists and guides</td>
<td>• Resource lists and guides for the public</td>
</tr>
<tr>
<td>• Newsletters sharing COVID-related information</td>
<td>• Newsletters sharing COVID-related information</td>
</tr>
<tr>
<td><strong>Non-database Resource Information:</strong></td>
<td><strong>Websites:</strong></td>
</tr>
<tr>
<td>• Google docs updated frequently; maintaining COVID resources outside of the database</td>
<td>• State COVID-related websites; website banner; website splash page; website redesign; web-based resource directory</td>
</tr>
<tr>
<td><strong>Database:</strong></td>
<td><strong>Social Media:</strong></td>
</tr>
<tr>
<td>• COVID-19 tags/codes and vaccination tags/codes</td>
<td>• Frequent updates on service availability/changes</td>
</tr>
<tr>
<td><strong>Project Management:</strong></td>
<td></td>
</tr>
<tr>
<td>• Using platforms like Teams to disseminate information</td>
<td></td>
</tr>
</tbody>
</table>
Managing Community Resource Information During the Pandemic: Examples from Respondents

- During the pandemic, we employed a “crisis management team” and had **daily updates** available for staff as information changed.
- We put a **banner** on the front of our website that identifies COVID-related resources.
- We created a **COVID-19 folder** which houses all the lists/resources specific to COVID-19 and the changes it caused. It has typical folders like food but pandemic specific folders emerged such as facemask, stimulus checks and vaccination information.
- Created the **weekly eBlast** to include COVID-related changes, resources, new programs and service changes. This eBlast is sent to the full ADRC as well as community partners.
- Early in the pandemic, our **agency website** became a key element of keeping the public updated on nutrition locations, as well as nutrition providers that were switching from congregate to grab-and-go. We provided a resource listing, updated daily, with dates, hours, and locations of nutrition providers, and other nutrition resources (food banks, etc.).
Sharing Community Information…

Resources for Seniors
Online COVID-19 Resources List

I&R/A Technology Survey: Information Systems

Client Tracking/Case Management and Reporting Software

- WellSky Aging & Disability (formerly SAMs)
- Other
- Microsoft Excel
- State-Developed Software
- Agency Specific, In-House Developed Software
- CIL Management Suite
- PeerPlace
- RTZ Associates' GetCare
- Microsoft Access
- Aging Information Management System (AIMS)
- WellSky Community Services (formerly ServicePoint)
- CILs First
- NetCIL
- MYCIL
- Trilogy Network of Care
- RTM Designs Navigate
- Microsoft Dynamics CRM
- Do not know
- VisionLink CommunityOS
- Therap

Percent of Respondents (N=160)
I&R/A Technology Survey: Information Systems - Database

Resource Database Software Used if Not the Same as Client Tracking/Case Management Software

- Other
- Agency Specific, In-House Developed Software
- Microsoft Word
- Microsoft Excel
- State-Developed Software
- Do not know
- Microsoft Access
- iCarol
- WellSky Community Services (formerly ServicePoint)
- WellSky Aging & Disability (formerly SAMS)
- VisionLink CommunityOS
- Trilogy Network of Care
- RTM Designs Navigate
- PeerPlace
- North Light Resource House
- Aunt Bertha

Percent of Respondents (n=60)
I&R/A Technology Survey: Closed-Loop Referral Systems

Agencies Participating in a Closed-Loop Referral System

<table>
<thead>
<tr>
<th>Response</th>
<th>Percent of Respondents (N=159)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>45%</td>
</tr>
<tr>
<td>Do not know</td>
<td>25%</td>
</tr>
<tr>
<td>Yes</td>
<td>15%</td>
</tr>
<tr>
<td>An initiative is in development</td>
<td>10%</td>
</tr>
<tr>
<td>This type of initiative exists (or is underway) in my community/state but my agency does not participate in it</td>
<td>5%</td>
</tr>
</tbody>
</table>
We partner with the Greater Flint Health Coalition to utilize a platform called Holon. This is a closed-looped referrals system with over 20 local agencies involved. It has been valuable with the Flint Water Crisis and linking many seniors to local services.

We use a database called NCCARE360 to search for resources and sometimes refer individuals. The provider for this database is Unite Us.

Our statewide NWD system uses closed loop referral approach and helps track by program/category type of referral. We also have a person-centered portal focused on SDoH and accessing services specific to multiple needs an individual may be confronted with.

Currently working with 211 and RTM Designs in demo-ing a proof-of-concept SDOH screener using CMS’ AHC survey that links to [our data] and 211 data. Also, early talks with Activate Care and 211 in developing a true closed-loop referral process.

Unite Us. However, as many of our providers have signed up, very few use the system. It requires entering data in current systems and again in the Unite Us system. Providers do not have the time to enter data twice.
Aging and Disability I&R/A Technology
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Wrapping Up
I&R/A Technology Survey: Final Words from Respondents

“The ability to do things remotely has been helpful but is not a solution for everything. We miss a portion of the elder and disabled population who do not have access that we were serving previously. We also miss a great deal of what is actually going on in a facility setting…”
(reported by a state Department of Social Services)

“The AAAs support not returning to a new normal by instead maintaining a new standard of innovation. It has been amazing to see how many older adults have learned how to use technology through all of this. It wasn't to obtain our services virtually, it was to FaceTime with their grandkids, Zoom into church services, etc. They learned for personal reasons, but then already knew how to use the technology to then also have a virtual service delivery.”
(reported by a state Office of Aging and Disability Services)

“It has been a crazy year but our I&A staff stepped up for the challenge. They have been the busiest department during the pandemic and have adapted to the constant changes.”
(reported by an Area Agency of Aging)
Contact Information

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Q&A