



# Technology Supports Connection: Findings from the Information and Referral/Assistance National Survey



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## Introduction

In Information and Referral/Assistance (I&R/A) practice, technology supports connection, enabling individuals to engage with I&R/A specialists to receive the help and referrals that they need. Technology has long been an important underpinning of many I&R/A programs – helping to ensure that individuals have access to unbiased information according to their communication preferences. The Covid-19 pandemic accelerated the use of technology to support remote work and service delivery. Longer-term trends such as the use of social media for communication, the growth of smart phone usage, and the expectation for access to online information have also influenced the use of technology in I&R/A services. At the same time, the pace of technology developments varies across the I&R/A network.

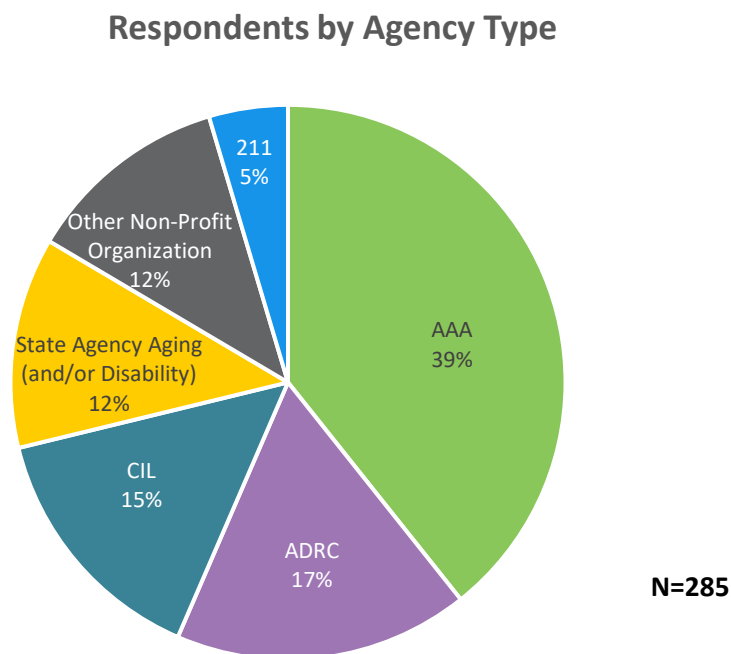
This issue brief will explore the use of technology in several key areas including service delivery modalities, telephony systems, the resource database, information systems/software, taxonomy, and social media. This brief is part of a series of issue briefs that draws from the Aging and Disability 2023 Information & Referral/Assistance National Survey. This survey, conducted by ADvancing States in partnership with the National Council on Independent Living (NCIL), was designed to assess the state of I&R/A programs and systems serving older adults, people with disabilities, families, and caregivers. The survey captures the perspectives of state agencies on aging and disability, Area Agencies on Aging (AAAs), Aging and Disability Resource Centers (ADRCs), Centers for Independent Living (CILs), and other nonprofit human service organizations that provide or oversee I&R/A services. The 2023 survey builds on a 2018 survey of aging and disability I&R/A programs as well as a 2021 I&R/A technology survey, allowing for the identification of trends and developments over time. The 2023 I&R/A Survey gathered quantitative and qualitative data on a range of topics which will be presented in the issue brief series that will cover service delivery, technology, partnerships and system building, and training and quality assurance.

## Methodology and Respondents

ADvancing States' National Information & Referral Support Center developed the instrument for the 2023 I&R/A Survey with input from a workgroup of national, state, and local aging and disability professionals. In collaboration with NCIL, the survey was administered to agencies primarily within the aging and disabilities networks that provide or oversee I&R/A services. Responses were collected through a web-based survey tool in April-May of 2023. To assess the landscape of I&R/A programs and systems, the survey gathered data in several key areas including job responsibilities, service needs and unmet needs, partnerships, quality assurance, training, and information technology.

The survey received 285 responses representing public and nonprofit agencies at the state, local, and even national levels that provide or oversee I&R/A services. Respondents included a small number of 211 programs. 211 is a Federal Communications Commission designated 3-digit number for health and human services information and referrals. 211 programs provide information and referral (I&R) services to all community members in areas served by 211.<sup>1</sup> See Figure 1 for respondents by agency type. In reviewing Figure 1, it is helpful to keep in mind that while respondents could only select one agency type for their organization, some respondents likely work in organizations that include more than one type of agency. For example, a respondent may work in a AAA that is also the lead agency for an ADRC.

Figure 1



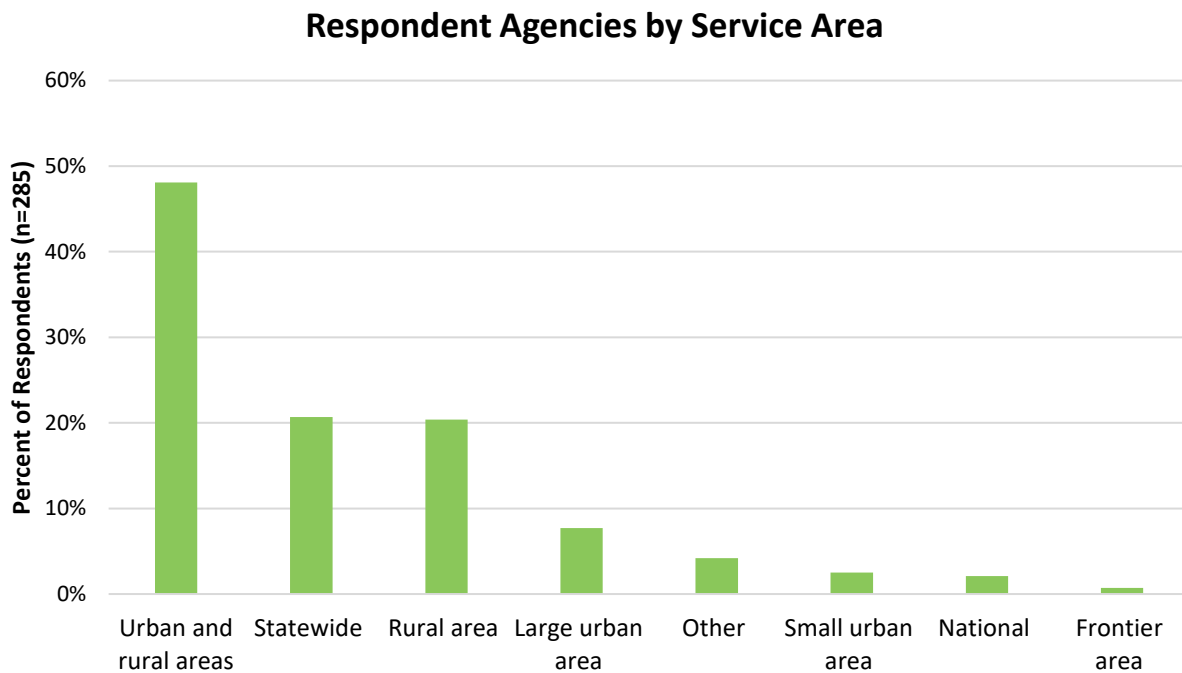
*Description:* Figure 1 is a pie chart of survey respondents by agency type. There was a total of 285

<sup>1</sup> The 211 service is provided by more than 200 local organizations across the United States.

respondents. 39% of respondents were from a AAA, 17% of respondents were from an ADRC, 15% of respondents were from a CIL, 12% of respondents were from State Agency on Aging and/or Disability, 12% were from other non-profit organizations, and 5% were from 211 agencies.

Survey respondents were also asked to identify their agency’s service area type. As shown in Figure 2, nearly half of respondents are in agencies whose service areas include both urban and rural areas. An equal number of respondents reported that their agency serves a rural area or has a statewide purview. Under 10 percent of respondent agencies serve a large urban area or some other type of service area. This data may be helpful to keep in mind when considering digital access issues and how digital access barriers may vary based on geographic area.

Figure 2



*Description:* Figure 2 is a bar chart of respondent agencies by service area. The top three service areas were urban and rural areas, statewide, and rural area only.

## I&R/A Service Delivery Modalities

The process of providing information and referral is grounded in a one-to-one interaction between an individual and a community resource specialist.<sup>2</sup> While diverse communication channels (e.g. phone, email, text, chat, etc.) can enable this interaction, providing I&R/A services over the telephone has remained a mainstay of I&R/A practice as shown in Figure 3. Over 90 percent of survey respondents reported that specialists at their agency frequently provide I&R/A services over the telephone. The prevalence of telephonic service delivery may reflect the preferences or needs of individuals, the complexity of people’s situations, limited digital access or connectivity, or other factors.

At the same time, the experience of the Covid-19 pandemic led agencies to increase their use of different communication channels as reported in the 2021 I&R/A Technology Survey issue brief.<sup>3</sup> The 2021 technology survey found, for example, greater use of email and video conferencing to provide I&R/A services. The 2023 I&R/A Survey findings suggest that this trend is, to some degree, outlasting the public health emergency (PHE). For example, in the 2023 survey, over 50 percent of respondents reported that specialists provide service over email frequently. Thirty-two percent reported that specialists provide service over video conferencing some of the time. However, the provision of service over online chat and by text messaging has remained at low levels over time even as older adults, people with disabilities, and caregivers may use digital communication like texting regularly. More information on the use of chat and text is provided further down in this section of the issue brief. Of note, findings from the 2023 survey show that in person service provision has rebounded since the height of the pandemic. Compared with data from the 2021 Technology Survey, data from the 2023 survey indicates a return to community events, to receiving individuals at the service site, and even to home visits to a certain degree (for example, 27 percent reported that specialists provide services in person at a consumer’s home or other location chosen by the person some of the time, similar to data from the 2018 I&R/A Survey conducted prior to the pandemic<sup>4</sup>).

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<sup>2</sup> Inform USA. (2022). I&R Training Manual: Training Community Resource Specialists (Volume 2).

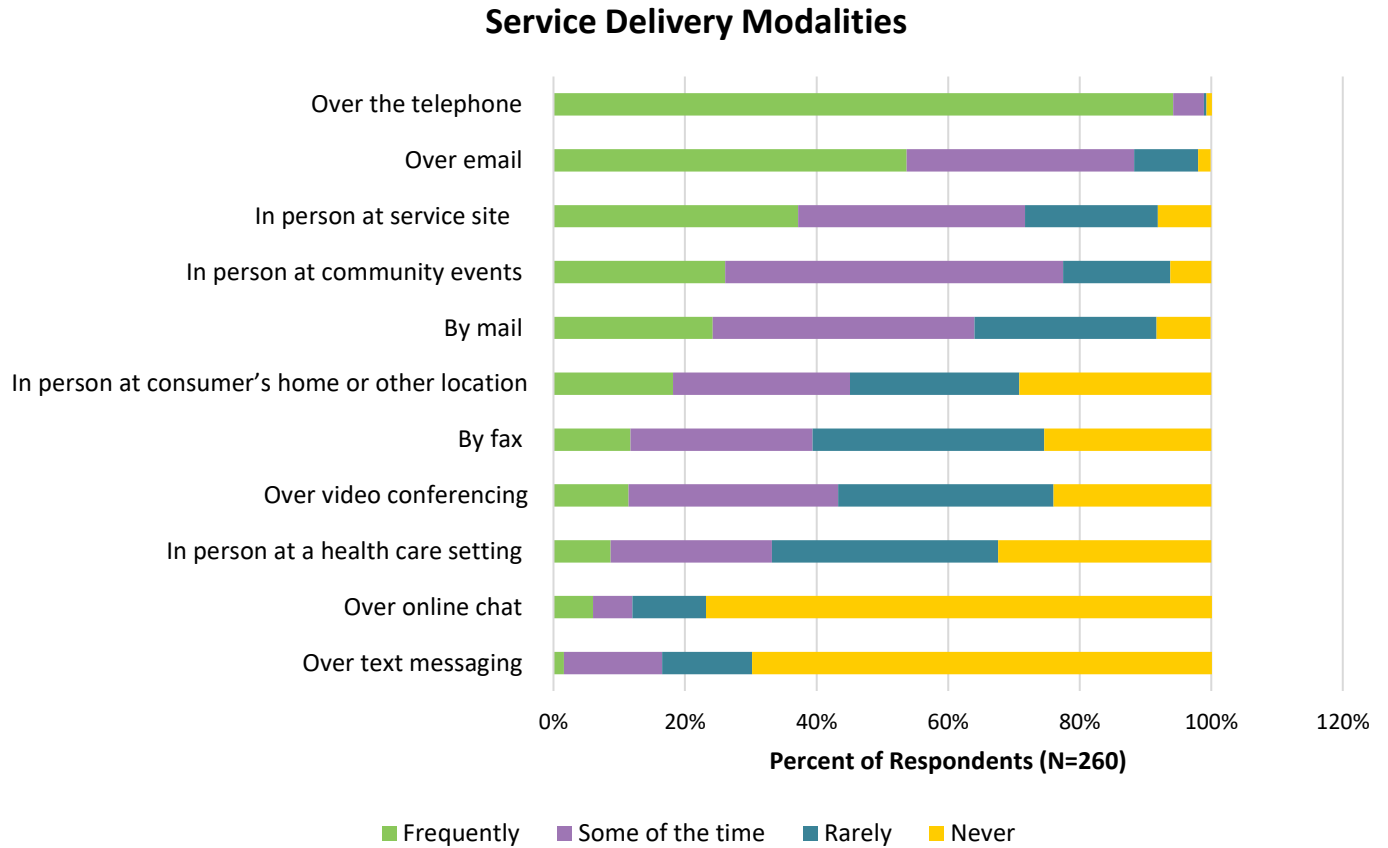
<sup>3</sup> Advancing States. (October 2021). A New Standard of Innovation: Findings from the I&R/A Technology Survey. Available at

<https://www.advancingstates.org/sites/nasuad/files/u33914/Final%20IR%20Technology%20Survey%20Issue%20Brief%202021.pdf>

<sup>4</sup> Advancing States (formerly NASUAD). (2019). Complex Needs and Growing Roles: The Changing Nature of Information and Referral/Assistance. Available at

[https://www.advancingstates.org/sites/nasuad/files/NASUAD%20IR%20Survey%20Report%200719\\_web.pdf](https://www.advancingstates.org/sites/nasuad/files/NASUAD%20IR%20Survey%20Report%200719_web.pdf)

Figure 3



*Description:* Figure 3 is a horizontal stacked bar chart titled "Service Delivery Modalities" that summarizes how frequently respondents (N=260) use different methods to deliver I&R/A services. Telephone and email are the most frequently used modalities, while video conferencing, in-person visits, and mail are used some of the time. Methods like fax, online chat, and text messaging are rarely or never used by most respondents. Analysis of this chart is in the main text.

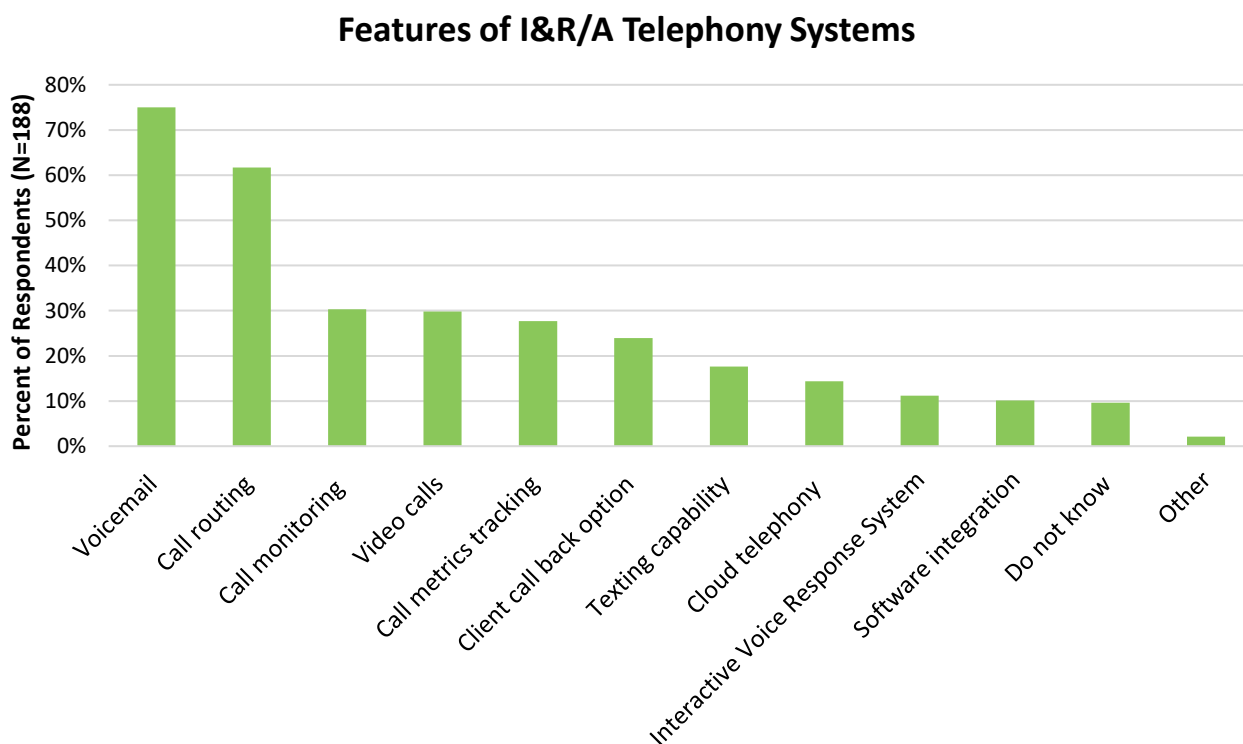
Given the prevalence of telephonic service delivery, the 2023 I&R/A Survey gathered additional information on this mode of service delivery as well as on the availability of a statewide toll-free telephone number to provide access to I&R/A services. The survey question on the availability of a statewide toll-free number was asked only to state agency respondents. Of these respondents, the vast majority (86 percent of 36 responses) indicated that their state does have a statewide toll-free number for individuals to access I&R/A services. Since it can be difficult for individuals to know where to turn to for help with social care needs, the availability of a statewide number can be a valuable tool in connecting individuals to I&R/A services as long as that number is well publicized to target audiences.

Survey respondents as a whole were asked about their organization's telephony systems including features that support I&R/A service delivery. Respondents were qualitatively asked to identify the telephony software/system that their organization uses for I&R/A services. Respondents identified a range of systems including ones that have a contact center focus and



ones that may support organizational operations broadly. Systems or products identified by respondents include, for example: Zoom, Microsoft Teams, Genesys, Salesforce, Free Conference Call, Nextiva, Broadvoice, RingCentral, 8x8, Mitel, NICE InContact, LinkLive, and Avaya. Respondents were asked to identify the features of the telephony systems that support I&R/A services and these are shown in Figure 4. This data suggests that telephony system features may support various functions of I&R/A service provision such as call handling (e.g. call routing), queue management (e.g. client call back option; IVR system), quality assurance (e.g. call monitoring; call metrics), and after-hours options (e.g. voicemail; IVR system).

Figure 4

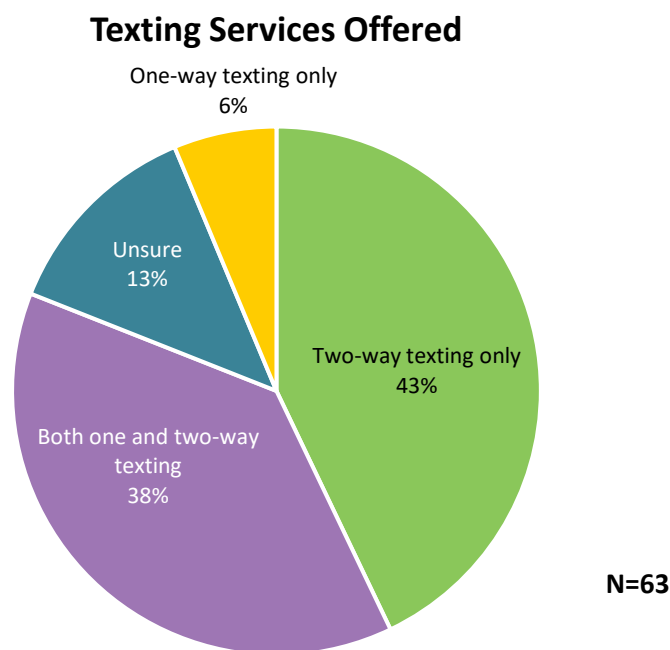


*Description:* Figure 4 is a bar chart titled "Features of I&R/A Telephony Systems" that displays the percentage of respondents (N=188) using various telephony features. Voicemail is the most common feature, used by 75% of respondents, followed by call routing (62% of respondents). Other features including call monitoring, video calls, call metrics tracking, and client callback options are utilized by 20%-30% of respondents. Less frequently used features include texting capability, cloud telephony, interactive voice response systems, and software integration, ranging between 10%-20% of respondents.

As noted earlier in this section of the issue brief, the provision of I&R/A services by online chat and text messaging is low compared to other communication channels, with many respondents reporting that their agencies never provide I&R/A services in these ways (77 percent reported never providing services over online chat and 70 percent reported never by text messaging). In

other sectors of the I&R field, providing services by text or online chat may be more prevalent to meet help-seekers where they are with multichannel access to information and referral. At the same time, the Covid-19 pandemic served as a catalyst for greater adoption of technology. In the 2021 I&R/A Technology Survey, among respondents that indicated that their agencies provided I&R/A services by text and/or chat, a fair percent reported initiating these service modalities during the pandemic (reported by 38 percent of respondents for text services and by 50 percent of respondents for chat services).<sup>5</sup> This trend continues to be reflected in data from the 2023 I&R/A Survey. For example, nearly one quarter of respondents whose agencies provide I&R/A services by text messaging reported that their agencies have been doing so for between two and three years (i.e., initiating text messaging services during the pandemic). Respondents whose agencies provide I&R/A services by text messaging were further asked to identify whether the service includes one and/or two-way texting (Figure 5). Most respondents indicated the availability of two-way, conversational text messaging alone or in combination with one-way texting (one-way texting can be used to send notifications, for example). When asked how text messaging is provided, respondents offered a mix of approaches. For example, in some cases, text service is provided through the same system used for telephony. In some agencies, work cell phones are used (one respondent shared, “I just use my county cell phone”). Agencies might also use a texting platform such as PreventionPays™.

Figure 5



*Description:* Figure 5 is a pie chart titled "Texting Services Offered" that illustrates the distribution of texting service types among respondents (N=63). 43% reported using two-way texting only, 38% reported using both one-way and two-way texting, 13% of respondents were unsure, and 6% reported using one-way texting only.

<sup>5</sup> Advancing States. A New Standard of Innovation: Findings from the I&R/A Technology Survey.

Finally, respondents whose agencies provide I&R/A services by text messaging and/or online chat were asked to qualitatively describe experiences with these modalities (i.e., take-up rate, staffing, etc.). Some respondent agencies offer these communication channels to all individuals while for others these options are available by request or as an accommodation. Some respondents indicated low to moderate use of these modalities or identified use scenarios. For example, busy caregivers may appreciate the option to connect by chat or text messaging (a respondent shared, “Texting is much easier and sometimes preferred by family members seeking information for loved ones.”). These communication options can offer accessible access to I&R for some inquirers. Specialists may use text to provide resource information following a call. Respondent agencies take different approaches to staffing chat and text options. For example, in some agencies, all staff are trained to respond to inquiries by chat and/or text. In other agencies, one staff person handles these types of contacts. Training varies as well from brief training to more in-depth (a respondent described how “Options counselors who respond to chats must go through a specialized chat training course and are evaluated and coached before responding to chats.”). Several respondents described benefits to multichannel communication from accessibility to document sharing (as shared by a CIL respondent, “We have had success with text and online chat. That is the way most of the world communicates and so most people prefer this option.”).

***“The biggest benefit of using texting with clients is that they can take pictures of documents to send to us. Then we can help them understand the documents. It might be that they are stuck on a question on an application for benefits, they don't understand a government letter, or they don't read English well, so they need help and we can save them a trip to our office.”***  
***- Area Agency on Aging respondent***

## The Resource Database

The resource database is a core component of delivering effective I&R/A services. Resource databases house community resource information – i.e., information on programs and services. The database supports access to accurate, comprehensive, and unbiased information. The database helps I&R/A specialists to identify resources for individuals and may be available to other professionals and/or the public. Many I&R/A programs maintain a resource database but programs might also access community resource information through a shared database or other collaborative effort. Among respondents in the 2023 I&R/A Survey, 72 percent (of 210 respondents) reported that their agency maintains a resource database and of these, 91 percent reported that this database is an electronic resource database. Fifteen percent reported that their agency does not maintain a database and another eight percent reported that their agency's database is in development. Several respondents did not know or indicated 'other' such as partnering with another organization to access a resource database (for example, a respondent shared "We have an in-house resource directory and utilize 211's resource database.").

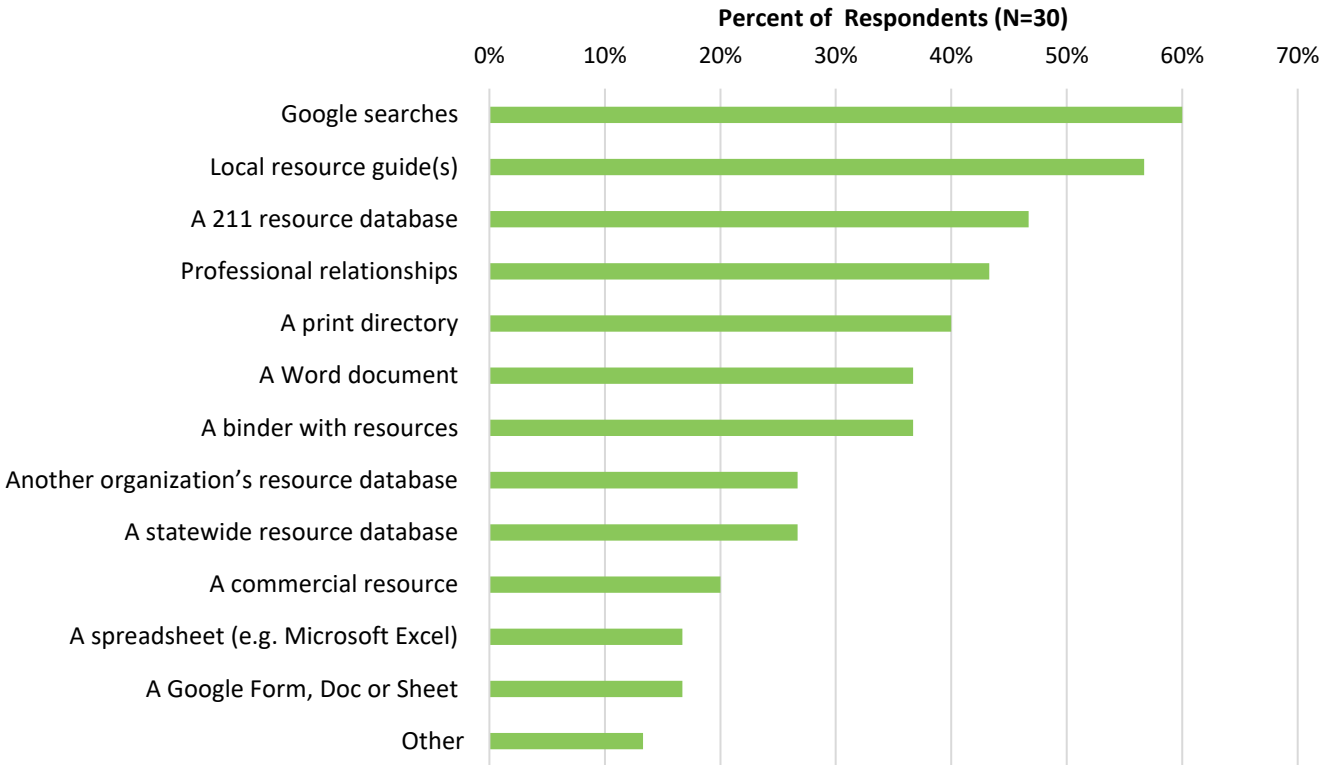
I&R/A programs have varying needs and capacity with regards to maintaining community resource information. Respondents who indicated that their agency does not maintain a resource database were asked how their agency does have access to information on programs and services (Figure 6). Some programs access a shared database or other available database. For some programs, a resource directory or even a binder or spreadsheet with resource information is used to support I&R/A services. Nearly half of those responding indicated using a 211 resource database. As in the 2021 Technology Survey, using local resource guides, professional relationships, and a 211 resource database are common approaches to accessing community resource information for I&R/A programs that do not maintain a database. Additionally, as found in the 2021 survey, Google searches are an often used approach to accessing information on community programs and services. While Google searches may be expedient, information gathered through an online search may be less comprehensive and reliable than information gathered from a trusted source such as a resource database maintained to I&R Standards.<sup>6</sup>

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<sup>6</sup> Inform USA. (July 2020). Inform USA Standards and Quality Indicators for Professional Information and Referral (Version 9.0). Available at <https://www.informusa.org/standards>

Figure 6

### Products or Systems Used by Agencies That Do Not Maintain A Resource Database



*Description:* Figure 6 is a bar chart titled "Products or Systems Used by Agencies That Do Not Maintain A Resource Database" that shows the tools utilized by respondents (N=30). The top 10 responses are Google searches (60%), local resource guides (57%), a 211 resource database (47%), professional relationships (43%), a print directory (40%), a Word document (37%), a binder with resources (37%), another organization's resource database (27%), a statewide resource database (27%), and a commercial resource (20%).

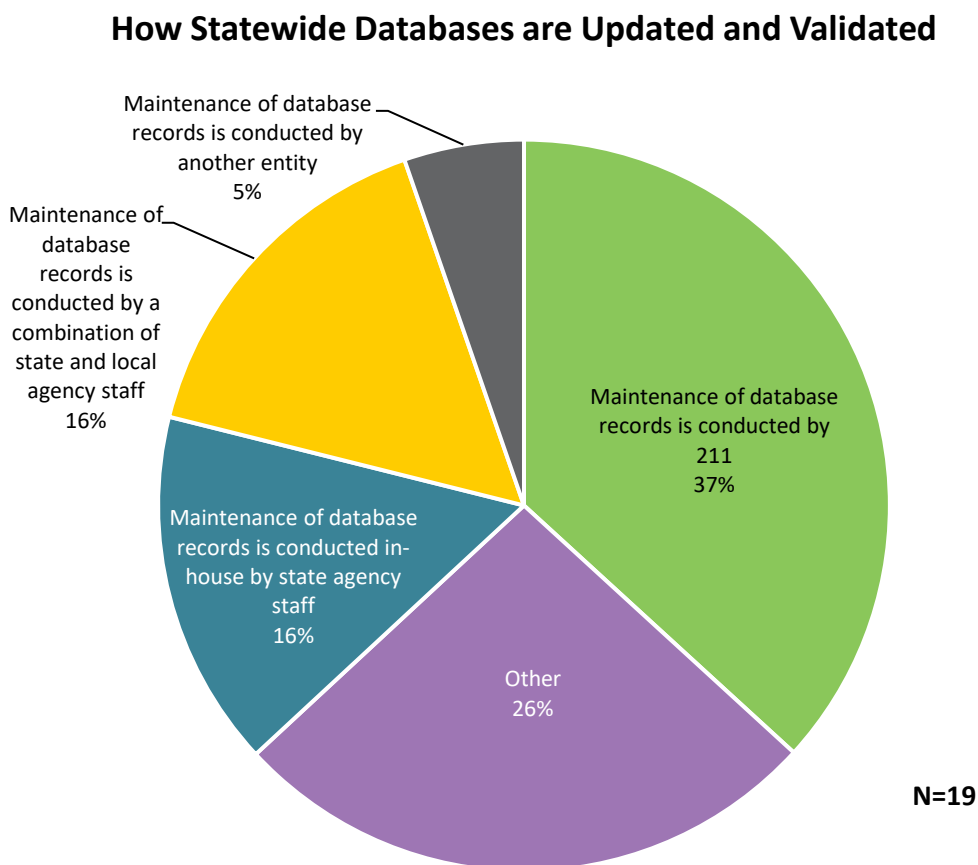
As shown on Figure 6 and noted above, some I&R/A programs access community resource information through a shared resource database such as a statewide database. Of 135 survey respondents, 38 percent indicated that their resource database is part of a platform shared with other I&R providers (such as a regional or statewide database platform). Fifty percent reported that this is not the case and 13 percent were unsure. In comments on this survey question, some respondents pointed to the availability of a statewide resource database such as EmpowerlinePRO used by AAAs in Georgia.

## Aging and Disability Resource Connection Database: EmpowerlinePRO

EmpowerlinePRO is Georgia's comprehensive statewide database of aging, long-term care, and disabilities services and resources for professionals. It supports Georgia's Aging and Disability Resource Connection network, a No Wrong Door access point for information and assistance. This database, managed by the Atlanta Regional Commission for over 20 years, is available to ADRC access points such as AAAs as well as other types of users by subscription. The database allows for customizable searches which can be local or regional depending on need. EmpowerlinePRO contains over 25 thousand resources for service areas such as housing, transportation, and in-home and care management services. It is a curated database system with topic specific inclusion criteria organized according to a two-tiered taxonomy of services. This Aging and Long-Term Care Taxonomy, composed of categories and services, is intended to be streamlined and intuitive for users. More information is available [online](#).

To gather additional information on statewide databases, the 2023 I&R/A Survey asked respondents from state agencies if their state has a statewide database of programs and services. Of 31 respondents, over half (65 percent) indicated that their state has a statewide resource database, 13 percent reported that a statewide database is in development, 19 percent reported no, and three percent were unsure. In comments, a couple of respondents noted that the statewide database has not been maintained. In the 2018 I&R/A Survey, 56 percent of 43 respondents reported that their state had a statewide database. Respondents who reported that their state has a statewide resource database were further asked to identify how resource database records are maintained as well as funding sources used to support the maintenance of the database. Figure 7 shows various ways that statewide resource database records are maintained. The data suggests that collaboration with 211 can be a valuable strategy for maintaining a statewide resource database. In other cases, as indicated by respondents, database maintenance is done in-house by the state agency or is a joint effort by local and state agency staff. In some cases, database maintenance is conducted by contractors or may be conducted by local agencies to support a statewide database.

Figure 7



*Description:* Figure 7 is a pie chart that illustrates how statewide databases are updated and validated (N=19). 37% of respondents reported that database maintenance is conducted by 211, 16% reported database maintenance is conducted in-house by state agency staff and another 16% reported that database maintenance is managed by a combination of state and local agency staff. 26% of respondents indicated 'Other' and 5% reported that database maintenance is conducted by another entity.

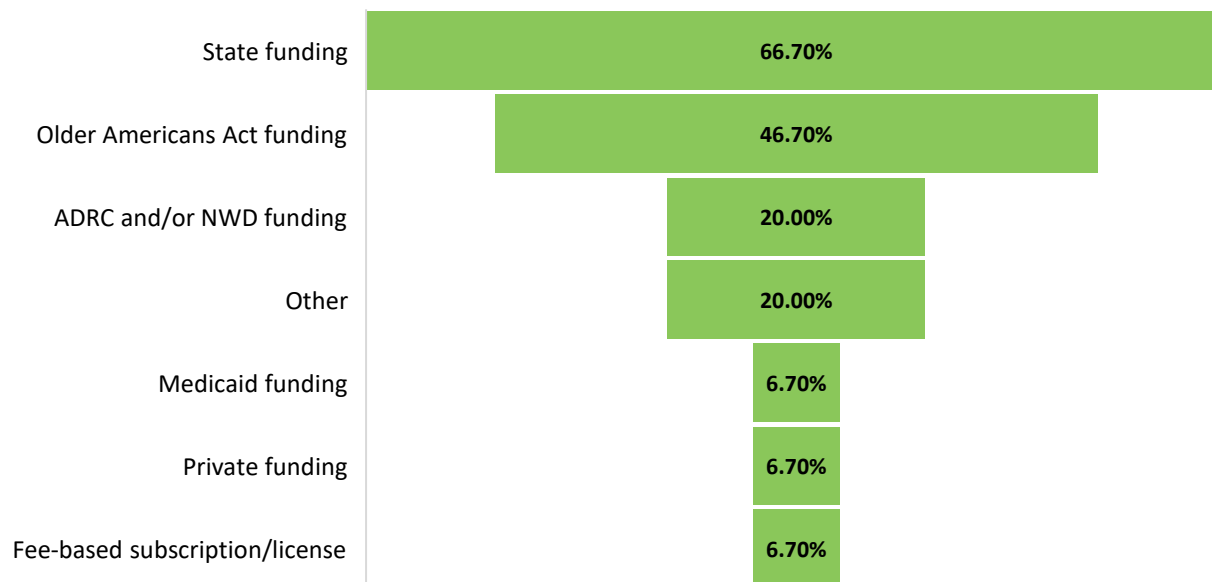
Figure 8 identifies funding sources used to support maintenance of statewide resource databases as indicated by respondents.<sup>7</sup> The data suggests that state funding can play an important role in sustaining such databases, particularly in the absence of dedicated funding for resource database maintenance. Given the time and effort needed to maintain a comprehensive and up-to-date resource database, states may need to leverage multiple funding sources for this work. Within the past several years, enhanced funding for Medicaid home and community-based services under the American Rescue Plan Act (ARPA) of 2021 has offered opportunities to support technology initiatives including initiatives within consumer access systems (i.e. systems that help

<sup>7</sup> Close to half of respondents selected more than one funding source.

individuals access information, resources, assistance, and decision support).<sup>8</sup>

Figure 8

### Funding Sources Used to Support Maintenance of Statewide Resource Databases (N=15)



*Description:* Figure 8 is a bar chart that displays the funding sources used to support the maintenance of statewide resource databases (N=15). 66.7% of respondents reported using state funding, 46.7% reported using Older Americans Act funding, 20% reported using Aging and Disability Resource Center and/or No Wrong Door funding and 20% reported using other unspecified sources. 6.7% of respondents reported using each of the following sources: Medicaid funding, private funding, and fee-based subscriptions or licenses.

Along with gathering information on statewide resource databases, the 2023 survey asked respondents about sharing community resource information more broadly, including with other organizations and partners as well as with the public (i.e. individuals seeking information for themselves, caregivers, family members, and others). Among respondents whose agencies maintain a resource database, Figure 9 shows the types of organizations with which respondent agencies share their resource database. Given the overall composition of survey respondents (see Figure 1), it is not surprising that the data in Figure 9 points to resource database sharing within existing networks (such as the aging and ADRC networks). Compared to the 2018 I&R/A Survey, respondents in the 2023 survey were more likely to report that their agency alone uses its resource database ('none' was reported by 39 percent of respondents in 2023 and by 32 percent in 2018). Another difference with the 2018 survey is in resource database sharing with 211. In the 2018 survey, this was reported by seven percent of respondents but 23 percent of respondents in

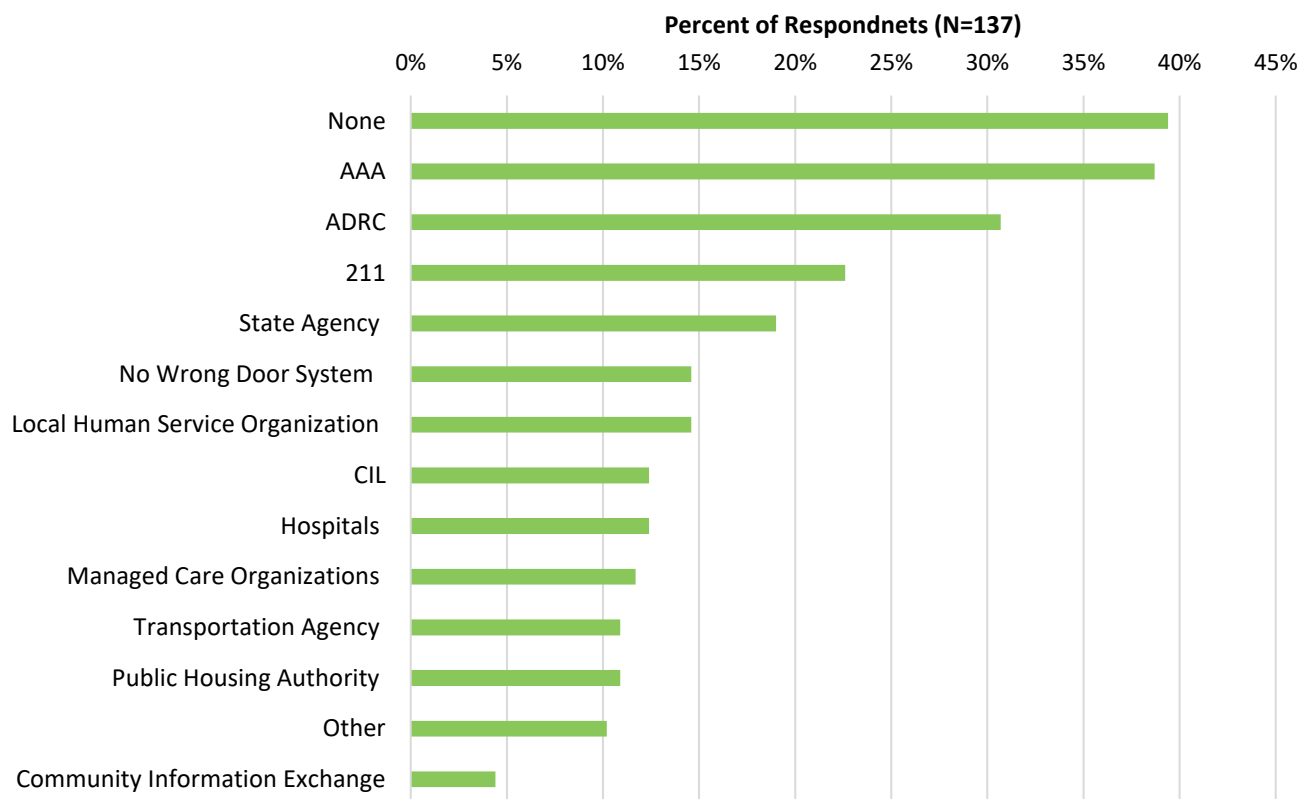
<sup>8</sup> For more information on ARPA initiatives, visit ADvancing States at <https://www.advancingstates.org/state-technical-assistance/arpa-hcbs-initiative>.



the 2023 survey indicated sharing the resource database with 211. Trends towards more sharing of community resource information are important as they suggest greater collaboration among agencies which reflects key principles within Standards for Information and Referral.<sup>9</sup> Respondents in the 2023 survey also indicated higher levels of resource database sharing with other types of organizations such as hospitals and public housing agencies. This is a positive trend though opportunities to strengthen coordination may continue to arise particularly given the current emphasis on addressing social determinants of health through social care referrals. In the ‘other’ category on Figure 9, respondents provided examples such as sharing community resource information on certain topics upon request or providing access to information online.

Figure 9

### Entities With Which Agencies Share Their Resource Database



*Description:* Figure 9 is a bar chart showing the types of entities with which agencies share their resource database (N=137). The top 10 responses are none (39%), AAA (38.7%), ADRC (31%), 211 (23%), state agency (19%), No Wrong Door system (14.6%), local human service organization (14.6%), CIL (12%), hospitals (12%), and managed care organizations (11.7%).

<sup>9</sup> Inform USA Standards and Quality Indicators for Professional Information and Referral (Version 9.0).

Respondents who reported that their agency maintains a resource database were also asked if this resource database is available to the public (Figure 10). Providing independent access to community resource information for the public and other human service professionals is a component of professional standards for I&R, reflecting the value of providing different options for individuals to learn about programs and services in their community.<sup>10</sup> Additionally, during the Covid-19 pandemic, providing self-service options for individuals and professionals to access community resource information in a changeable service environment helped to supplement mediated access to information through contacts with community resource specialists. In light of this, it is interesting to note that 41 percent of those responding in the 2023 survey reported that their agency’s resource database is not available to the public while 32 percent reported that an online database is publicly available. In comparison, in the 2021 I&R/A Technology Survey conducted in the midst of the pandemic, 47 percent of those responding indicated that their agency offered an online, searchable resource database to the public (and only 21 percent reported that their agency’s database was not available to the public). At the same time, it is important to recognize that maintaining a public-facing resource database is complex and time-consuming work that may lack adequate funding in the aging and disabilities networks, especially as pandemic-related funding winds down or has expired. Additionally, agencies may offer access to community resource information in other formats such as an online resource directory and even printed resource directories. In fact, 20 percent of respondents indicated that their agency offers a print directory to the public. For individuals with digital access barriers, print directories may be an important way to connect to community resource information. Such directories can also be tailored to specific communities or types of resources (such as home care providers or frequently requested resources). Several respondents in comments noted that resource lists are available upon request.

Figure 10

Resource Database Availability to the Public	Percent of Respondents (N=148)
An online, searchable resource database is available to the public	32%
An online resource directory or list is available to the public	18%
A print directory is available to the public	20%
The resource database is not available to the public	41%
A public database/directory is in development	1%
Do not know	4%
Other	6%

*Description:* Figure 10 is a table titled “Resource Database Availability to the Public” (N=148). The top options include ‘An online, searchable resource database is available to the public’ (32%), ‘An online resource directory or list is available to the public’ (18%), ‘A print directory is available to the public’ (20%), and ‘The resource database is not available to the public’ (41%).

<sup>10</sup> Ibid.

Respondents whose agencies provide an online resource database or directory to the public were further asked to share examples of search options that help individuals to navigate online resources as well as practices that help to ensure the accessibility of online information. In terms of options for searching an online database or directory, commonly identified practices include:

- Key word search;
- Search by location (i.e. zip code);
- Resources categories (i.e., organizing resources by categories);
- Guided search with visual icons; and
- Custom search filters (i.e. filter by topic, etc.).

Agencies might also offer a taxonomy-based search option for professionals. Regarding accessibility practices, respondents shared several examples of practices addressing language accessibility, access for individuals experiencing digital/technology barriers, and accessibility for people with disabilities. For example, a few respondents noted practices such as the availability of language translation services, the option to select a language (i.e., Spanish, Korean), and the availability of resource lists in multiple languages. As noted in Figure 10, agencies may provide resource information in print to help address digital access barriers. Finally, some respondents pointed to accessibility options for online information such as options to change font size, level of contrast, and color. Agencies might engage with people with disabilities in developing and/or testing an online site. One respondent mentioned using a third party to run accessibility checks on an online resource directory. Depending on the type of agency, the agency itself may help consumers with access to assistive technology devices and services.

### Self-Advocacy Resources from Disability Rights of West Virginia

The screenshot shows the top portion of the Disability Rights West Virginia website. At the top, there is a row of navigation icons including back, forward, home, and search. To the right is a 'Recite' button. Below the icons is the website's logo, a search bar with the text 'Search...', and two buttons: 'Accessibility Tools' and 'BOD and PAC Members'. A horizontal menu contains the following items: HOME, ABOUT US, OUR SERVICES, PROGRAMS, DRWV ADVOCACY IN MOTION, SELF-ADVOCACY RESOURCES (highlighted in blue), NEWS/NEWSLETTERS/CAREERS, and CONTACT US.

## SELF-ADVOCACY RESOURCES

To look for resources, choose a resource category from the list below. This will take you to a page with links related to that topic.

### Resource Categories

- [ABLE](#)
- [Americans with Disabilities Act \(ADA\)](#)
- [Americans with Disabilities Act \(ADA\) - State of West Virginia \(AT\)](#)
- [Autism](#)
- [Blindness/Visual Impairment](#)
- [Children and Families \(not Education\)](#)
- [Criminal/Juvenile Justice](#)
- [Deafness/Hard of Hearing](#)



*Description: Disability Rights of West Virginia (DRWV) webpage displaying 'Self-Advocacy Resources' at the top. Below the title is a brief description encouraging users to select a resource category for related links. A list of resource categories, including topics such as 'ABLE,' 'Autism,' 'Blindness/Visual Impairment,' and 'Criminal/Juvenile Justice,' is provided on the left side of the page. A photo of hands typing on a laptop is shown on the right side. At the top of the page, accessibility tools, search bar, and navigation menu are visible, along with the DRWV logo.*

Disability Rights of West Virginia (DRWV) is the federally mandated protection and advocacy system for people with disabilities in West Virginia. DRWV protects and advocates for the human and legal rights of persons with disabilities. Its services include Information and Referral. I&R may provide information about DRWV and information about additional programs and resources that relate to the individual's service needs and rights as a person with a disability. The DRWV website has a deep repository of [self-advocacy resources](#) that is searchable by keyword as well as resource categories. A range of accessibility tools are available on the website to support individuals in acquiring the information that they need.

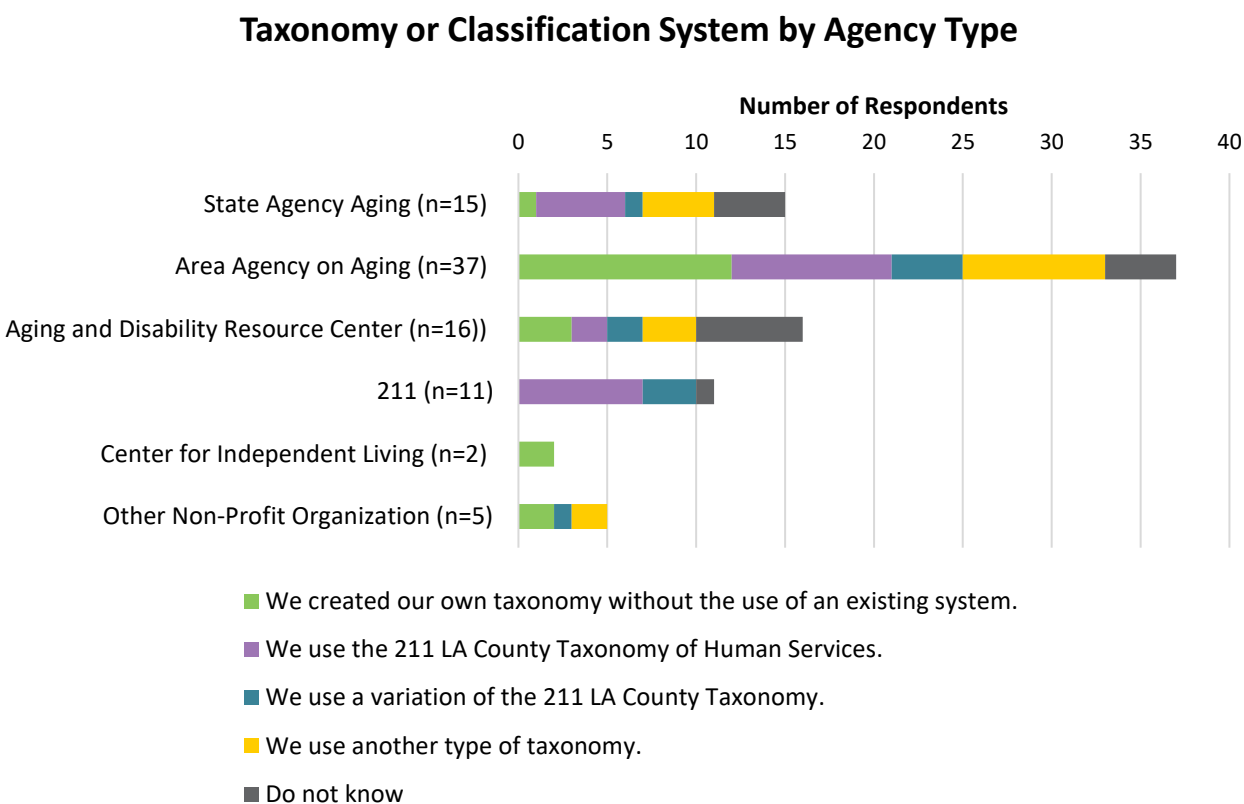
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Finally, on the topic of resource databases, the 2023 survey asked respondents whether their organization uses a taxonomy or other classification system to define, index, and access information on programs and services in a resource database or directory. Among 213 respondents, 42 percent indicated that their organization does use a taxonomy or other classification systems for this purpose and 39 percent indicated no. Four percent shared that a taxonomy is in development and 15 percent of respondents were unsure if their organization uses a taxonomy. The 2021 I&R/A Technology Survey did not ask about taxonomy use, however, in the 2018 I&R/A Survey, 34 percent of 317 respondents reported that their organization used a taxonomy or other classification system to index and access community resource information. In the I&R field broadly, agencies might use a common taxonomy maintained by 211 LA County. This taxonomy – called the 211 Human Service Indexing System (211HSIS) and formally known as the 211 LA County Taxonomy of Human Services – contains over 3,500 taxonomy terms that apply to aging and disabilities issues and offers aging and disability starter sets through filters. While 211HSIS provides a standardized set of terms and definitions for use in the I&R field, not all agencies use this taxonomy. Agencies might use a different classification system or have developed their own system for indexing and accessing community resource information. In some cases, agencies may crosswalk their system to 211HSIS. Some agencies do not use a taxonomy per se.

Figure 11 illustrates the use of taxonomies or classification systems by agency type among respondent agencies that use a taxonomy or classification system to index and retrieve information in a resource database or directory. As shown on Figure 11, there is variation in how aging and disability I&R/A programs approach the use of taxonomy, with some using a common framework and others using custom or agency-specific taxonomies/classification systems. This variation may reflect the different needs of agencies but might also pose challenges to sharing community resource data within or across networks. Overall, of 86 respondents, 27 percent reported that their organization uses 211HSIS (i.e., the 211 LA County Taxonomy of Human Services at the time of the survey), 13 percent reported using a variation of 211HSIS, 20 percent reported using another type of taxonomy, 23 percent indicated that their organizations created

its own taxonomy, and 17 percent did not know. Respondents who reported that their organization uses another type of taxonomy were asked to comment on this. Some respondents pointed to specific software used by their organization (for example, Apricot case management software or Navigate). I&R software itself may be able to accommodate different classification systems as chosen by agencies. Other respondents indicated that their organization uses a 211 database, which is likely to use 211HSIS. Several respondents identified specific taxonomies such as the Charting the LifeCourse taxonomy or the Aging and Long-Term Care Taxonomy that supports the EmpowerlinePRO database used by AAAs among other agencies in Georgia. A few respondents referenced using spreadsheets. This qualitative data along with the quantitative findings underscore the variation in the field.

Figure 11



**Description:** Figure 11 is a horizontal stacked bar chart that shows the taxonomy or classification systems used by different types of agencies. The responses are grouped by agency type. AAAs (n=37), ADRCs (n=16), and State Agencies (n=15) showed a mix of using the 211 LA County Taxonomy, creating their own taxonomy, using a variation of the 211 LA County Taxonomy, and using another type of taxonomy. 211 agencies (n=11) primarily reported using the 211 LA County Taxonomy or its variation. CILs (n=2) reported creating their own taxonomy. Additional analysis of the chart is provided in the text.

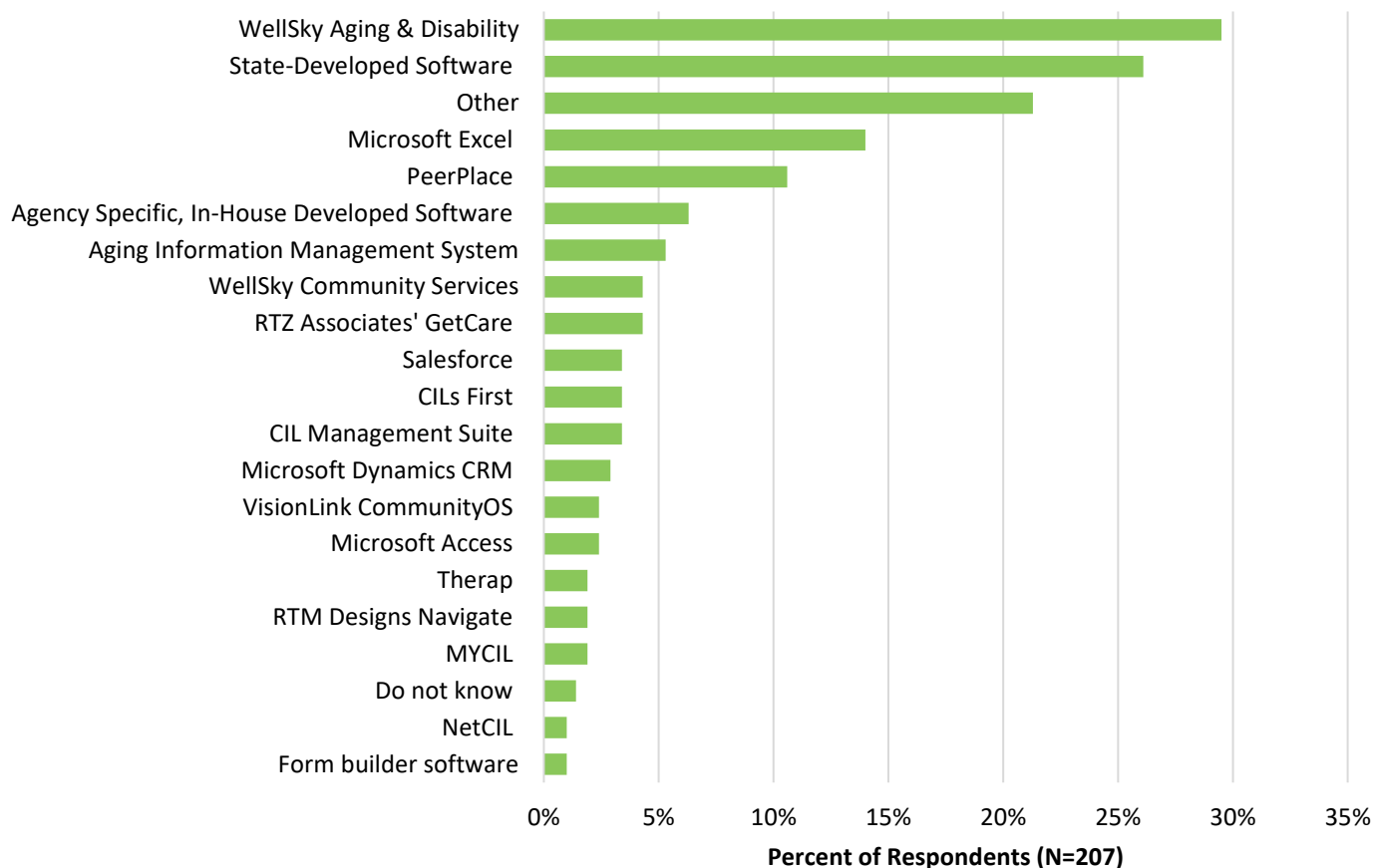
## Information Technology Systems

Information Technology systems underpin the day-to-day activities of I&R/A programs. These software systems support client-facing activities and resource databases/directories. The 2023 survey asked respondents about software used for client tracking and reporting, software linkages with other agencies, purposes for software linkages, and about software used for resource databases if different from the software used for client tracking and reporting.

Figure 12 provides aggregate information on software used for client tracking, case management and reporting functions that respondents identified as used by their agencies. This type of software may be used to capture information on client needs, referrals, services, and more. While respondent agencies use a variety of software products as shows on Figure 12, the data indicates that WellSky Aging & Disability and state-developed software were identified more often by respondents than other products for managing client information. At the same time, respondent agencies might also use office software such as Microsoft Excel for this purpose. These findings are similar to those from the 2021 I&R/A Technology Survey, though in the 2023 survey, more respondents overall reported that their organization uses state-developed software. It is possible that the category of state-developed software could include commercial software that is provided by the state to its network agencies. Twenty-one percent of respondents identified that their agency uses 'other' software not otherwise listed on Figure 12. However, in qualitative comments on the use of 'other' software, some respondents did mention software products listed on Figure 12 including WellSky and PeerPlace products. Respondents also identified software products such as iCarol, WildApricot, various customer relationship management platforms, Compass, Microsoft Teams, and more. It is also important to keep in mind that the use of software products varies by agency type. See Figure 13 in Appendix A for a breakdown of client tracking, case management and reporting software by respondent agency type. For example, CIL respondents are more likely to report that their organization uses software designed for the independent living network such as CIL Management Suite and CILs First.

Figure 12

### Software Used for Client Tracking/Case Management and Reporting



*Description: Figure 12 is a bar chart representing software products used for client tracking, case management and reporting functions (N=207). The top 12 responses are WellSky Aging & Disability (29.5%), state-developed software (26%), other unspecified software (21%), Microsoft Excel (14%), PeerPlace (11%), agency specific in-house developed software (6%), Aging Information Management System (5.3%), WellSky Community Services (4%), RTZ Associates' GetCare (4%), Salesforce (3.4%), CILs First (3.4%), and CIL Management Suite (3.4%).*

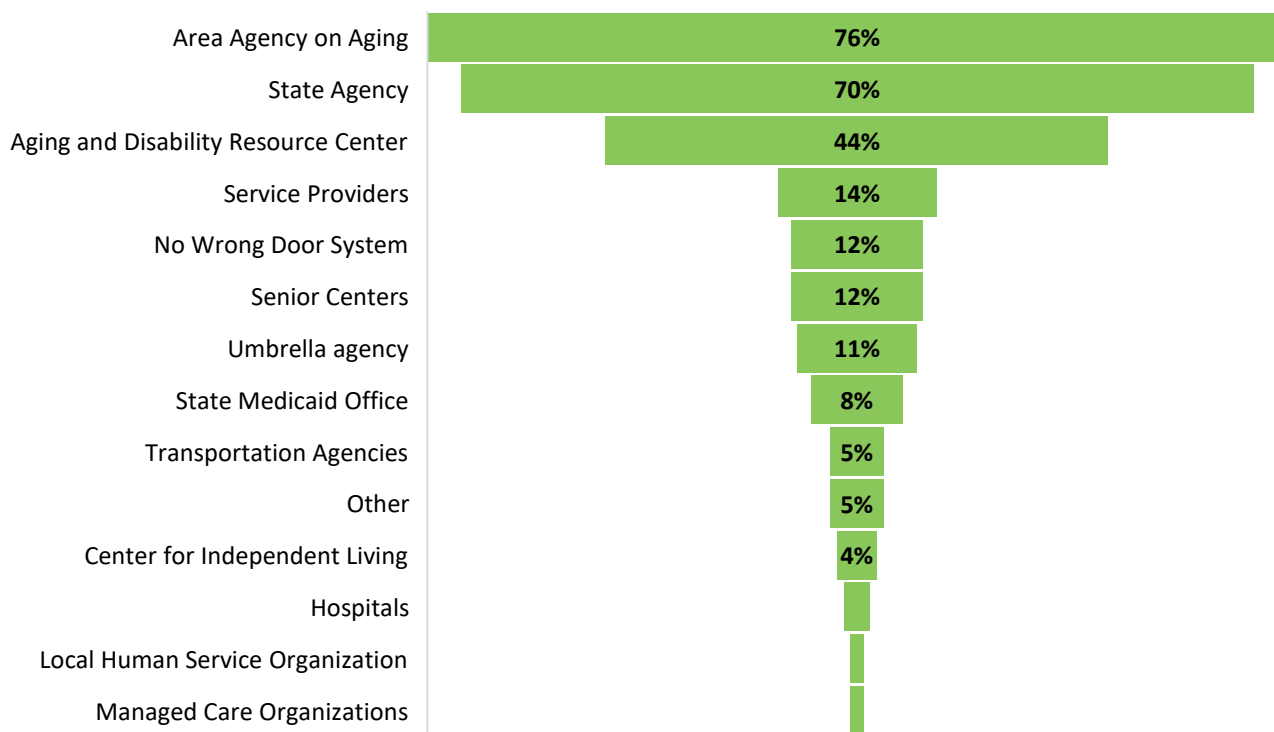
Whether using common or distinct software products, sharing data within and across agencies may help to improve service delivery, strengthen 'No Wrong Door' practices<sup>11</sup>, and potentially reduce duplication of effort. The 2023 survey asked respondents whether their agency's client tracking, case management and reporting software infrastructure is linked with other agencies and service organizations, and if so, to identify the purposes for these software linkages. Of 210 respondents, 41 percent reported that their agency's client tracking, case management, and reporting software is linked to other organizations (this was reported by 40 percent of

<sup>11</sup> Within aging and disability networks, a No Wrong Door system provides coordinated consumer access to information, person-centered counseling, and long-term services and supports.

respondents in the 2018 survey), 46 percent reported that this is not the case, and 13 percent did not know. Survey respondents were more likely to report software linkages within rather than across networks (Figure 14). Software linkages were most frequently reported to be within the aging network; this finding may also reflect the overall composition of survey respondents. At the same time, the data suggests that there may be opportunities to strengthen data sharing across systems, including with healthcare systems and payers, to better address social care needs and improve No Wrong Door access to services. Where software linkages do exist, they can support activities that enhance service delivery (Figure 15) such as sharing client-level data, care coordination, data reporting, tracking services received by clients, and making client referrals/electronic referrals.

Figure 14

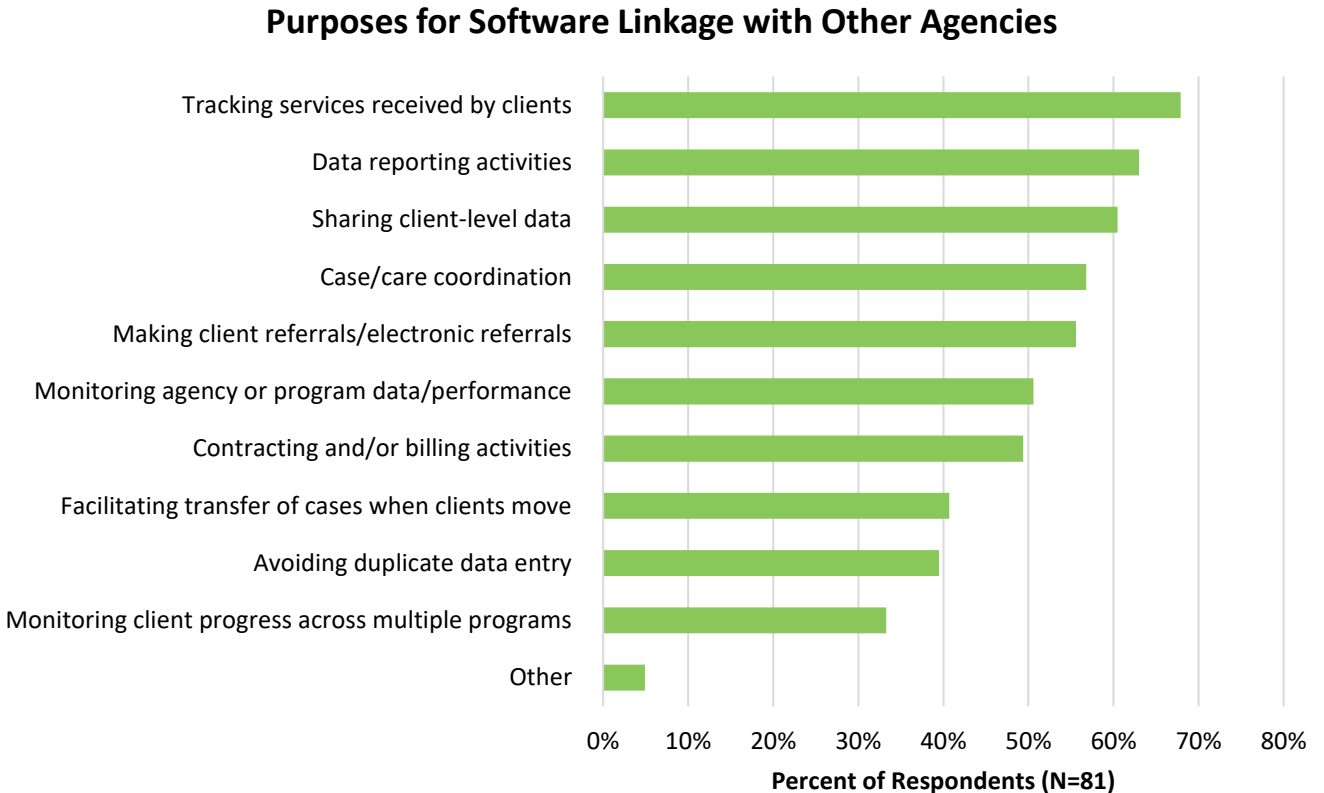
### Client Tracking/Case Management Software Linkages with Other Agencies (N=86)



*Description:* Figure 14 is a bar chart representing client tracking and case management software linkages with other agencies (N=86). Responses include software linkages with AAAs (76%), state agencies (70%), ADRCs (44%), service providers (14%), No Wrong Door systems (12%), senior centers (12%), umbrella agencies (11%), state Medicaid offices (8%), transportation agencies (5%), and CILs (4%).



Figure 15

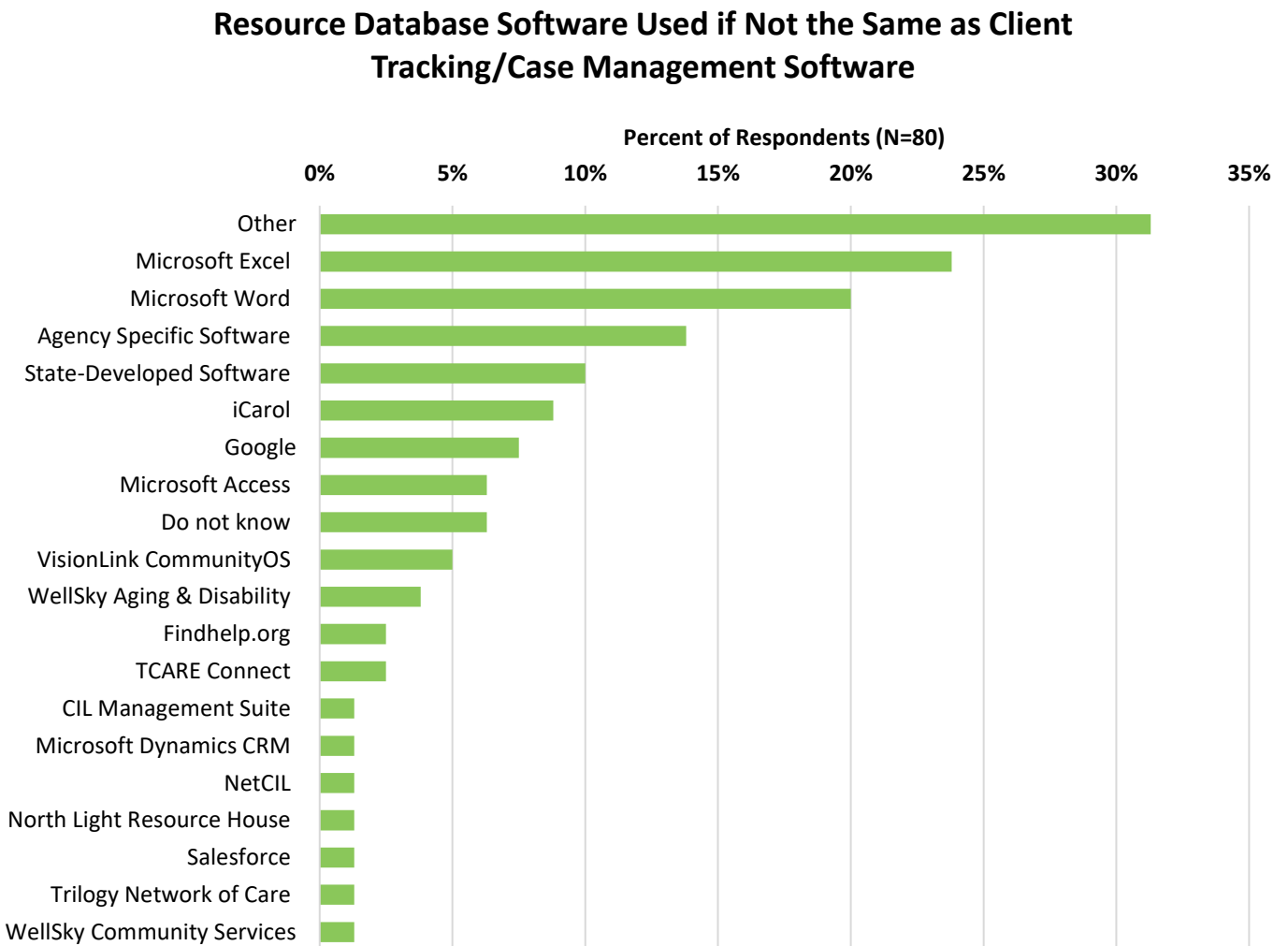


*Description:* Figure 15 is a bar chart representing the purposes for software linkages with other agencies (N=81). The top 10 reasons for software linkages include tracking services received by clients (68%), data reporting activities (63%), sharing client-level data (61%), case/care coordination (57%), client referrals/electronic referrals (56%), monitoring agency or program data/performance (51%), contracting and/or billing activities (49%), facilitating transfer of cases when clients move (41%), avoiding duplicate data entry (40%), and monitoring client progress across multiple programs (33%).

In terms of software supporting an organization’s resource database, some organizations use a common software system for client tracking, case management, and reporting functions as for the resource database, while other organizations use separate software for the database. In the 2023 survey, of 209 respondents, 38 percent indicated that their organization uses the same software system for client tracking, case management, and reporting as it does for its resource database; 40 percent reported that their organization uses different software; 14 percent of respondents were unsure; and nine percent indicated that their organization does not maintain an electronic resource database. In the 2021 I&R/A Technology Survey, 47 percent of respondents reported using the same software system for client tracking, case management, and reporting as for their organization’s resource database. Respondents in the 2023 survey who reported using different software for client tracking functions and the resource database were asked to identify the software used by their organization for the resource database, as shown on Figure 16. The data suggests that when organizations use different software for the resource

database, they seem more likely to use office suite software (i.e., Microsoft or Google products) or agency or state-developed software. A little over 30 percent of respondents selected ‘other’ and in qualitative comments, described different approaches such as curated resources shared internally (for example, internal files or folders on an agency’s network) or use of a 211 database.

Figure 16

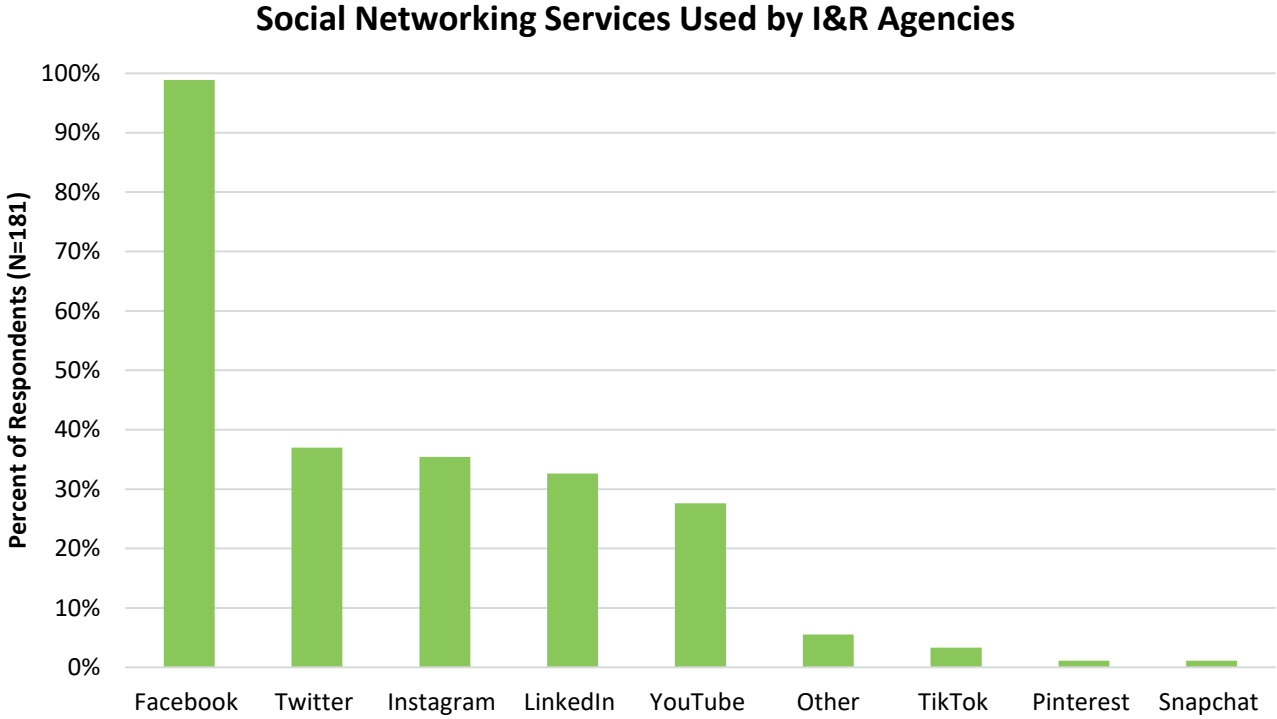


*Description:* Figure 16 is a bar chart representing resource database software used if not the same as client tracking/case management software (N=80). The top 10 responses are other unspecified software (31%), Microsoft Excel (24%), Microsoft Word (20%), agency specific software (14%), state-developed software (10%), iCarol (9%), Google (8%), Microsoft Access (6%), do not know (6%), and VisionLink CommunityOS (5%).

# Social Media

The final section of this issue brief addresses social media use. For I&R/A programs, social media can provide opportunities to connect and engage with individuals and family members, extend outreach and education, and raise awareness of programs and services. During the pandemic, social media offered a mechanism to disseminate information quickly as well as to provide programming and social engagement. In the 2021 I&R/A Technology Survey, use of social media was reported by 86 percent of respondents, underscoring the role of social media during the public health emergency. In the 2023 survey, 81 percent of respondents indicated that their organization uses social media to connect with individuals, family members, and caregivers. This finding suggests sustained use of social media for community engagement. As in prior surveys, the data from the 2023 survey shows that use of Facebook far surpassed the use of other social media platforms among respondent organizations, though use of X (formerly Twitter), Instagram, LinkedIn, and YouTube was reported by over a quarter of respondents (see Figure 17). The data also points to growth in the use of LinkedIn and Instagram since the 2021 Technology Survey (use of LinkedIn was reported by 33 percent in 2023 and by 21 percent in 2021; use of Instagram was reported by 35 percent in 2023 and by 29 percent in 2021) as well as decreased use of X (by seven percentage points between the 2021 and 2023 surveys).

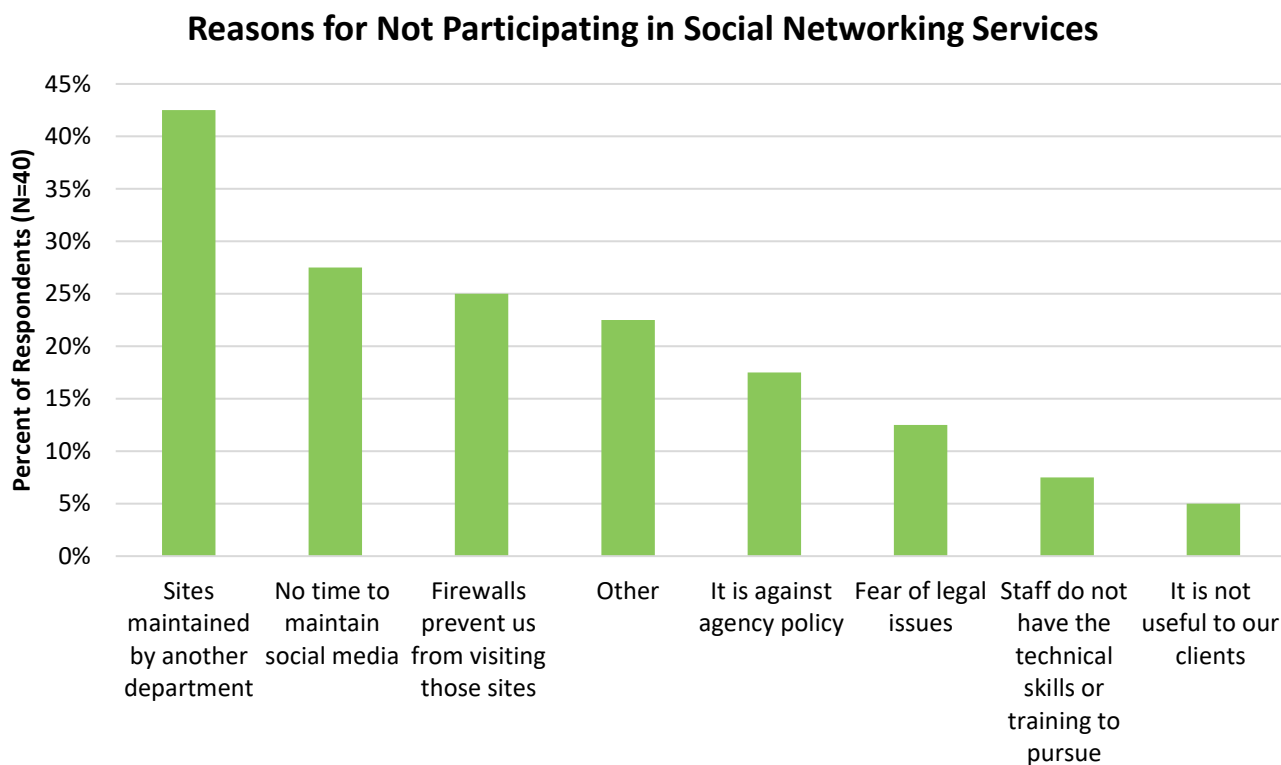
Figure 17



*Description:* Figure 17 is a bar chart representing social networking services used by I&R/A agencies (N=181). The top five social media services used by respondents are Facebook (99%), Twitter (37%), Instagram (35%), LinkedIn (33%), and YouTube (28%).

While the majority of respondents reported use of social media, 19 percent said that their organization does not use social media to connect with individuals. Respondents were asked to identify the reasons for this nonparticipation (see Figure 18). Over 40 percent of respondents indicated that social media sites are maintained by another department or division within their organization. Other key reasons for nonparticipation included lack of staff time, agency firewalls, and agency policy. In qualitative comments, a few respondents noted that their agency lacks state approval or indicated that their agency uses a website over social media.

Figure 18



*Description: Figure 18 is a bar chart representing reasons for not participating in social networking services (N=40). The top five reasons are sites maintained by another department (43%), no time to maintain social media (28%), firewalls prevent visiting social media sites (25%), other unspecified reasons (23%), and it is against agency policy (18%).*

As shown on Figure 19, respondents indicated that their agencies by and large use social media for outreach, education, general interest information, building brand awareness, and reaching their community. Over half of respondents reported that their agencies often use social media to announce key annual events, market programs and activities, provide general interest information, engage with the community, stay up to date on community events, and build brand awareness. As in prior surveys, these findings suggest an orientation towards outreach. Social media is used less frequently for more direct engagement with partners or individuals such as hosting events for the community or connecting individuals to a public resource database. Social

media platforms might also be used by individuals to reach out to organizations. Data from the 2023 survey shows that social media is used to receive consumer inquiries at least sometimes. At the same time, these platforms may not provide the privacy and confidentiality needed for I&R/A service delivery. In light of this, survey respondents were asked if their organization has a policy on handling individual inquiries received through social media and to briefly describe policies that address consumer engagement on social media.

Qualitative survey responses on policies for handling such inquiries highlighted a variety of practices:

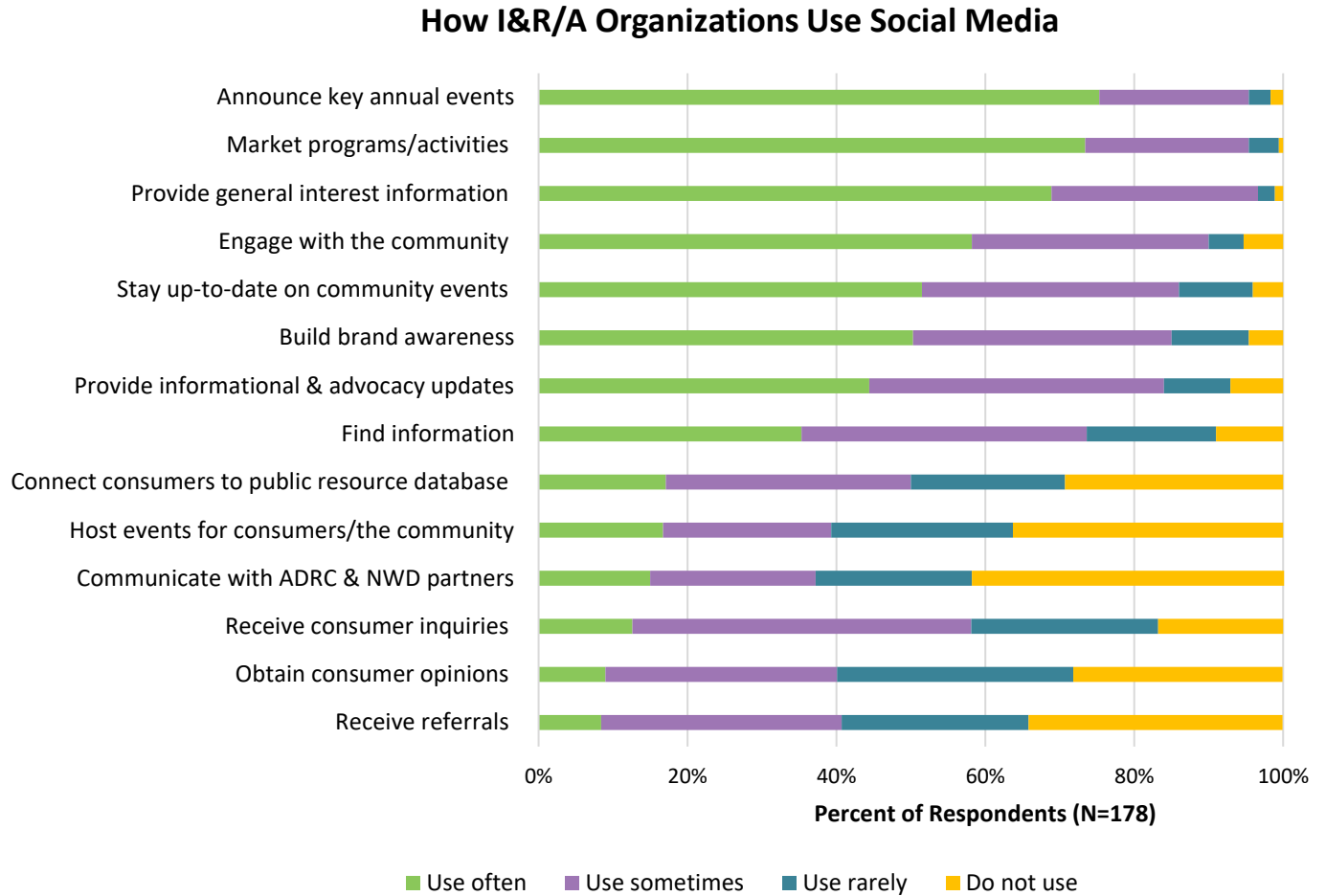
- **No Policy or Uncertainty:** Some respondents indicated that their organization does not have a specific policy in place, or they were unsure of any policy.
- **Centralized Handling:** In several cases, inquiries received via social media are handled by a central office or public information officers. Some organizations forward inquiries to specific departments such as Information & Referral, marketing, or social media specialists for further action.
- **Referral to Other Channels:** Many organizations seek to avoid handling detailed or personal inquiries on social media, instead referring consumers to more secure communication methods, such as phone calls, emails, or direct contact with staff members. This is often done to protect personal information and maintain privacy.
- **Social Media Teams:** Some organizations have dedicated social media teams or individuals responsible for managing inquiries. These teams often forward the inquiries to appropriate departments so that responses can be provided in a timely and secure manner.
- **Privacy and Confidentiality:** Several respondents cited privacy concerns, such as protecting Personally Identifiable Information (PII) and Health Insurance Portability and Accountability Act (HIPAA) compliance. As a result, they direct individuals to more secure platforms for detailed discussions.
- **Automated Responses:** Some organizations use automated responses on social media platforms to direct inquiries to helplines or other secure communication methods.
- **Direct Engagement:** A few respondents mentioned actively responding to inquiries on social media, but individuals are still referred to a secure or private communication method to continue the conversation.

Dovetailing on other data findings on social media use, these responses reflect a general trend toward using social media primarily for outreach and education, while avoiding handling sensitive or detailed consumer inquiries directly on these platforms.

***“Our I&A Supervisor receives the inquiries that come through our Facebook page and assigns them to an I&A staff member. We only use messaging with the clients, so that the conversation is private. And we interact as our page, not through a staff person's Facebook profile. Clients are directed to contact us by email or phone.”***

***- Area Agency on Aging respondent***

Figure 19



*Description:* Figure 19 is a horizontal stacked bar chart that illustrates how I&R/A organizations utilize social media across various activities. The data is categorized into four levels of use: ‘Use often,’ ‘Use sometimes,’ ‘Use rarely,’ and ‘Do not use.’ The most frequent uses of social media (high percentages of ‘Use often’ and ‘Use sometimes’) include announcing key annual events, marketing programs/activities, providing general interest information, engaging with the community, staying up-to-date on community events, and building brand awareness. Additional analysis of the chart is provided in the text.

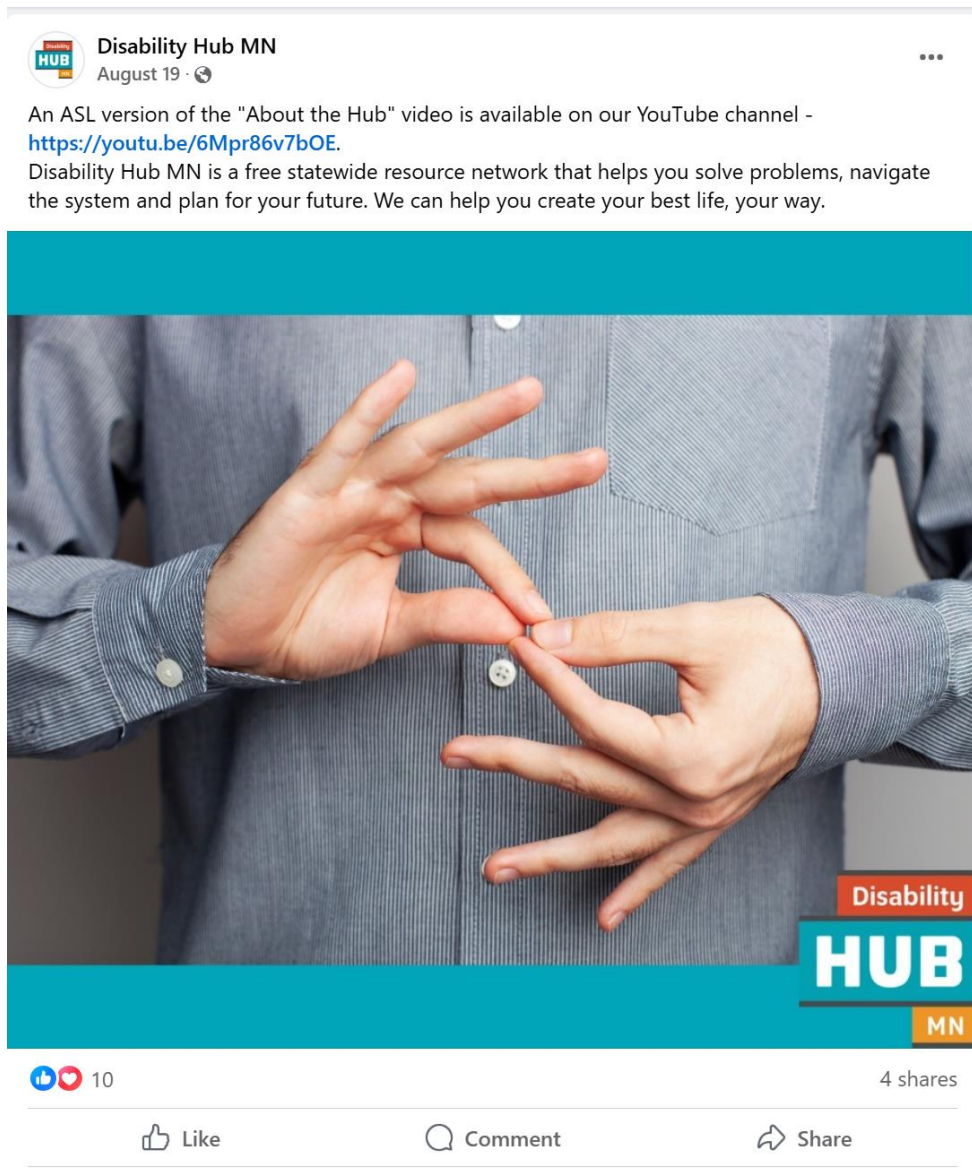
Finally, respondents were asked to share one example of what is working best for their organization with regards to social media use. Respondents shared a range of practices that tend to reflect how organizations are likely to use social media (Figure 19). Drawing from these practices, examples of promising social media use strategies are highlighted below. In particular, respondents called out the sharing of personal interest stories and photos of people, for example consumers and staff, as valuable strategies for engaging with individuals.

### *Promising Strategies for Social Media Use*

- **Event Promotion:** Many organizations find that posting information about upcoming events (e.g., workshops, health fairs, or community activities) helps engage the public. Consistently sharing events is especially useful in rural areas where social media helps broaden outreach.
- **Resource Sharing:** Sharing information from partner agencies and posting educational materials, such as facts about spotlight events or fraud awareness campaigns, helps keep followers informed.
- **Dedicated Social Media Staff:** Organizations with full-time social media specialists or media managers have found this role valuable for effective outreach, consistent messaging, and community engagement.
- **Timely Responses:** Quick replies to messages and comments on social media have proven helpful in maintaining consumer engagement and trust.
- **Community Engagement:** Some organizations use social media to announce local events, offer peer group support, and advocate for issues like elder abuse awareness and vaccine education.
- **Marketing Campaigns:** Social media may be a valuable tool for targeted campaigns, such as raising awareness about Medicare open enrollment, caregiver programs, or hiring efforts.
- **Consistency:** Regular posting and staying up to date with trends help organizations remain visible and relevant to their audiences.
- **Human Interest Stories:** Sharing personal stories, particularly those related to lived experiences, tends to drive engagement and positive reactions from followers.
- **Multimedia Use:** Some organizations are using platforms like YouTube for educational content, such as videos in multiple languages, or holding live sessions on Facebook to engage with audiences on issues like Medicare.

***“Disability Hub MN receives the most engagement from shared personal interest stories about people's lived experiences with a disability, in addition to topics-based presentations where we have an ASL interpreter and CART services.”***

***- State Agency respondent***



***Description:*** Close-up of a person making a hand gesture in American Sign Language (ASL). The individual is wearing a buttoned, striped shirt. The text on the image promotes an ASL version of the 'About the Hub' video, which is available on the Disability Hub MN YouTube channel. Disability Hub MN is described as a free statewide resource network that assists with solving problems, navigating systems, and planning for the future. The Disability Hub MN logo is displayed in the bottom right corner of the image.



## Conclusion

Data from the 2023 I&R/A Survey underscores the part that technology plays in enabling individuals to access information and receive the help that they need. The survey findings emphasize the role of technology in Information and Referral/Assistance service delivery, especially in light of the changes brought about by the Covid-19 pandemic. Telephonic services remain dominant, but there is an increasing adoption of other communication channels such as email, video conferencing, and to a lesser extent, text messaging and online chat. These newer modalities provide additional access points, particularly for caregivers or individuals with specific accessibility needs, though their adoption varies widely among agencies. The data also suggests that technology is important for outreach and engagement. Individuals can only connect with I&R/A services if they are aware of them and know about trusted access points.

Looking ahead, continued efforts to enhance technology integration and sharing of community resource information across networks will be essential. Greater collaboration and leveraging of technology may be important for sustainability. However, challenges related to digital access, funding, and resource database maintenance remain. Addressing these barriers will be important in ensuring equitable access to I&R/A services, particularly for older adults, individuals with disabilities, and caregivers.

This publication was supported in part by grant number 90EESC0001-01-00 from the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$1,199,905.00 with 75 percent funded by ACL/HHS and 25 percent funded by non-government source(s) in period of performance 08/01/2021-07/31/2026. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by ACL/HHS, or the U.S. Government.



NATIONAL  
INFORMATION & REFERRAL  
SUPPORT CENTER

**The National Information and Referral Support Center** is administered by ADvancing States, with funding provided in part by the Administration on Aging within the Administration for Community

Living, U.S Department of Health and Human Services. 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. Inform USA, USAging, and the National Council on Independent Living (NCIL) are key partners in the success of the Center.



ADVANCING  
STATES

**ADvancing States** represents the nation's 56 state and territorial agencies on aging and disabilities and long-term services and supports directors and supports visionary leadership, the advancement of systems innovation and the articulation of national policies that support long-term services

and supports for older adults and people with disabilities. ADvancing States' members administer services and supports for older adults and people with disabilities, including overseeing Older Americans Act (OAA) programs and services in every state. Together with its members, the mission of the organization is to design, improve, and sustain state systems delivering long-term services and supports (LTSS) for people who are older or have a disability and their caregivers.



NATIONAL COUNCIL ON  
INDEPENDENT LIVING

**The National Council on Independent Living** is the longest-running national cross-disability, grassroots organization run by and for people with disabilities. Founded in 1982, NCIL represents thousands of organizations and individuals including: individuals with disabilities, Centers for Independent

Living (CILs), Statewide Independent Living Councils (SILCs), and other organizations that advocate for the human and civil rights of people with disabilities throughout the United States. Since its inception, NCIL has carried out its mission by assisting member CILs and SILCs in building their capacity to promote social change, eliminate disability-based discrimination, and create opportunities for people with disabilities to participate in the legislative process to affect change. NCIL advances independent living and the rights of people with disabilities and envisions a world in which people with disabilities are valued equally and participate fully.

# Appendix A

Figure 13

## Client Tracking, Case Management, and Reporting Software Products by Agency Type

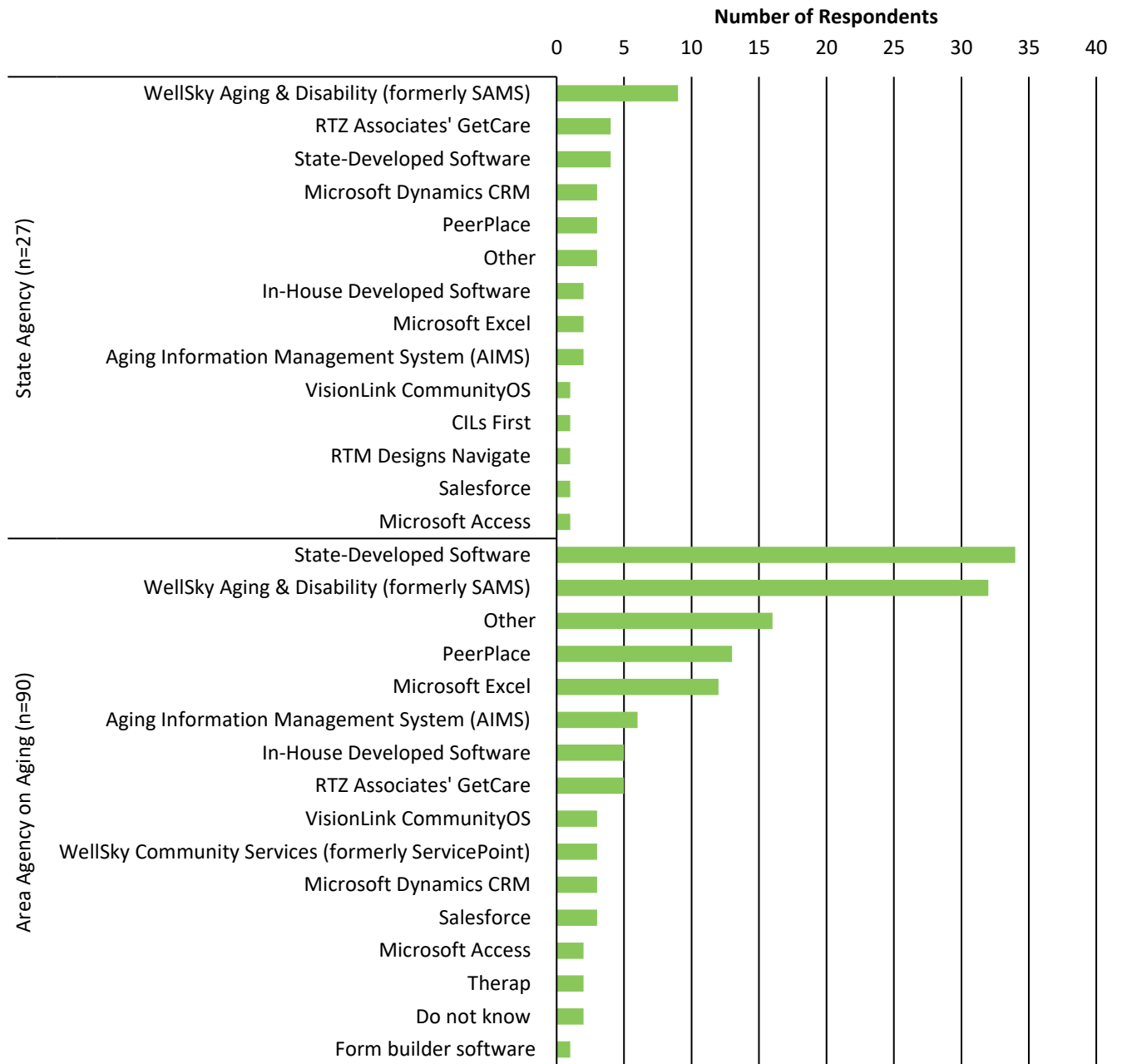
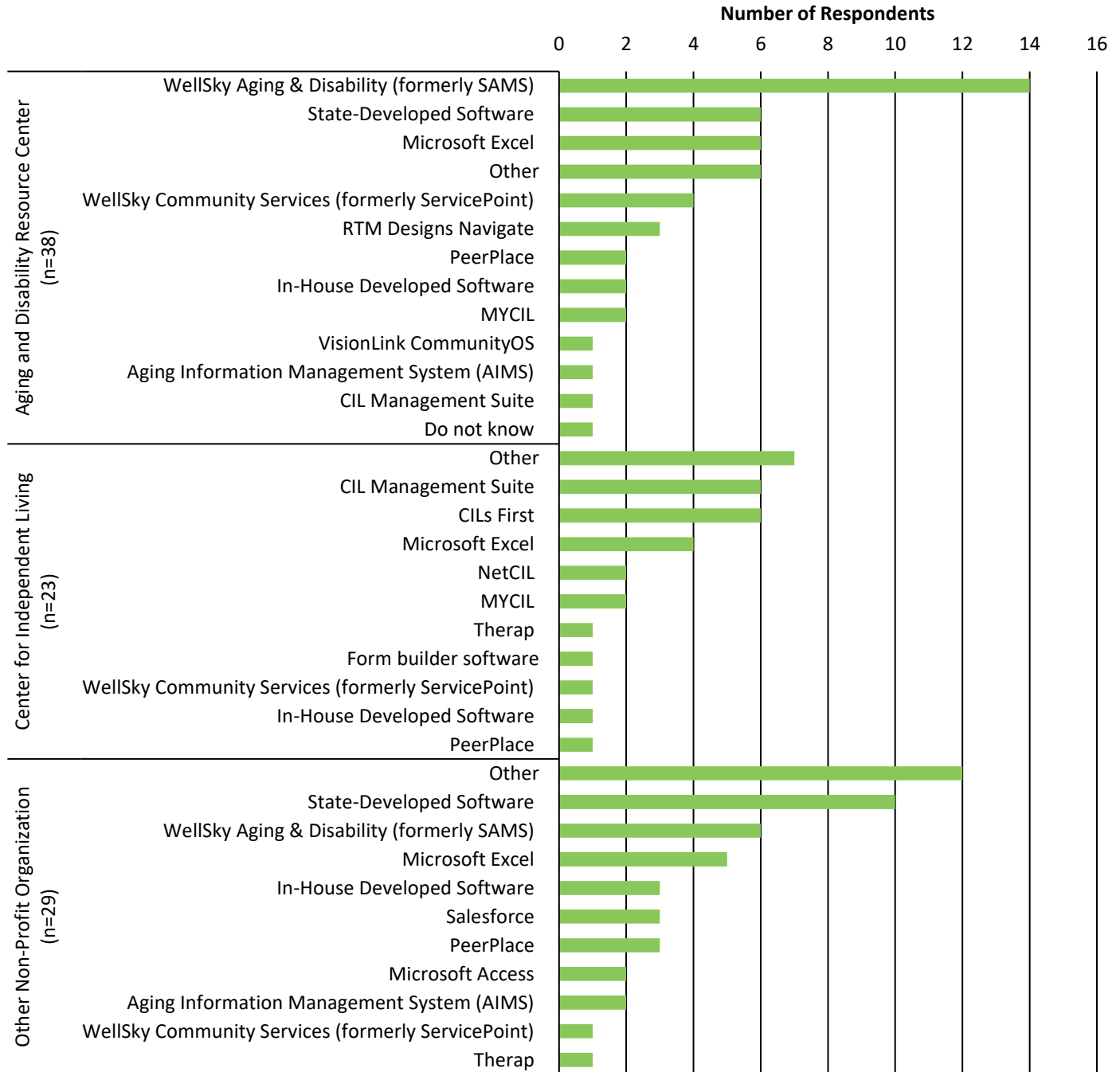


Figure 13 Continued

### Client Tracking, Case Management, and Reporting Software Products by Agency Type



Description: Figure 13 is a bar representing client tracking, case management and reporting software products by agency type. The top five software products reported by state agency

*respondents (n=27) are WellSky Aging & Disability, RTZ Associates' GetCare, state-developed software, Microsoft Dynamics CRM, and PeerPlace. The top five software products reported by AAA respondents (n=90) are state-developed software, WellSky Aging & Disability, other unspecified software, PeerPlace, and Microsoft Excel. The top five software products reported by ADRC respondents (n=38) are WellSky Aging & Disability, state-developed software, Microsoft Excel, other unspecified software, and WellSky Community Services. The top five software products reported by CIL respondents (n=23) are other unspecified software, CIL Management Suite, CILs First, Microsoft Excel, and NetCIL. The top five software products reported by other nonprofit organization respondents (n=29) are other unspecified software, state-developed software, WellSky Aging & Disability, Microsoft Excel, and in-house developed software.*