NATIONAL INFORMATION AND REFERRAL SUPPORT CENTER AND NCIL
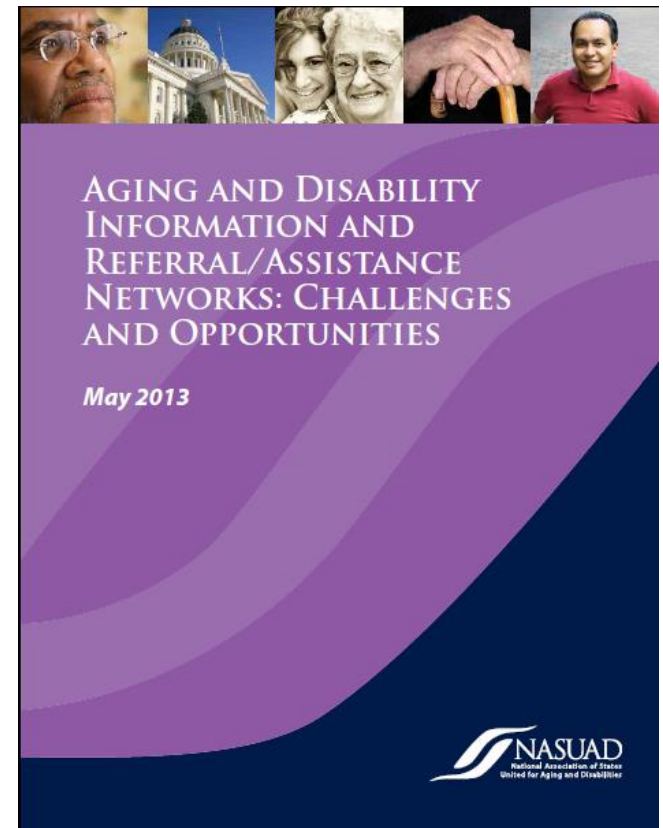
Aging and Disability I&R/A: Findings from the Field

May 30, 2015

I&R Network Survey

Survey of I&R Specialists in Aging and Disability Networks:

- Survey conducted every other year

- 2015 survey in the field from March 9 through April 10, 2015

- Coordinated with leads in each state to ensure participation across the U.S.

- Working with the National Council on Independent Living to encompass CIL perspective

AGING AND DISABILITY INFORMATION AND REFERRAL/ASSISTANCE NETWORKS: CHALLENGES AND OPPORTUNITIES

May 2013

NASUAD
National Association of States
United for Aging and Disabilities

2015 Survey - Methodology

- Used a web-based survey instrument

- Disseminated through NASUAD and NCIL to state-level agency directors and to agencies within the aging and disability networks

- Received 358 responses from: state agencies on aging and disability (12% of respondents); Area Agencies on Aging (50% of respondents); Aging and Disability Resource Centers (18% of respondents); Centers for Independent Living (10% of respondents); and other non-profit organizations (9.5% of respondents)

- Overlap between ADRCs and other types of respondents

2015 Survey - Structure

Designed to assess the state of I&R/A systems serving older adults and persons with disabilities. Covered 10 sections:

Section 1: Overview Questions

Section 2: Services, Referrals, Service Needs

Section 3: Social Media

Section 4: Partnerships and I&R/A System Building

Section 5: Information Technology/Management Information System (IT/MIS)

Section 6: Agency Standards and Quality Assurance

Section 7: Training and Certification

Section 8: Sustainability - Private Pay Population

Section 9: Sustainability - Expanding Roles for I&R/A Agencies

Section 10: Conclusion and General Comments

Preliminary Themes

- Funding and sustainability are significant concerns, particularly with regards to ADRC efforts.

- Partnerships and networks continue to evolve to serve both older adults and individuals with disabilities.

- A changing environment and expanding roles provide new opportunities and challenges for I&R/A agencies.

- Quality matters to effective I&R/A service delivery.

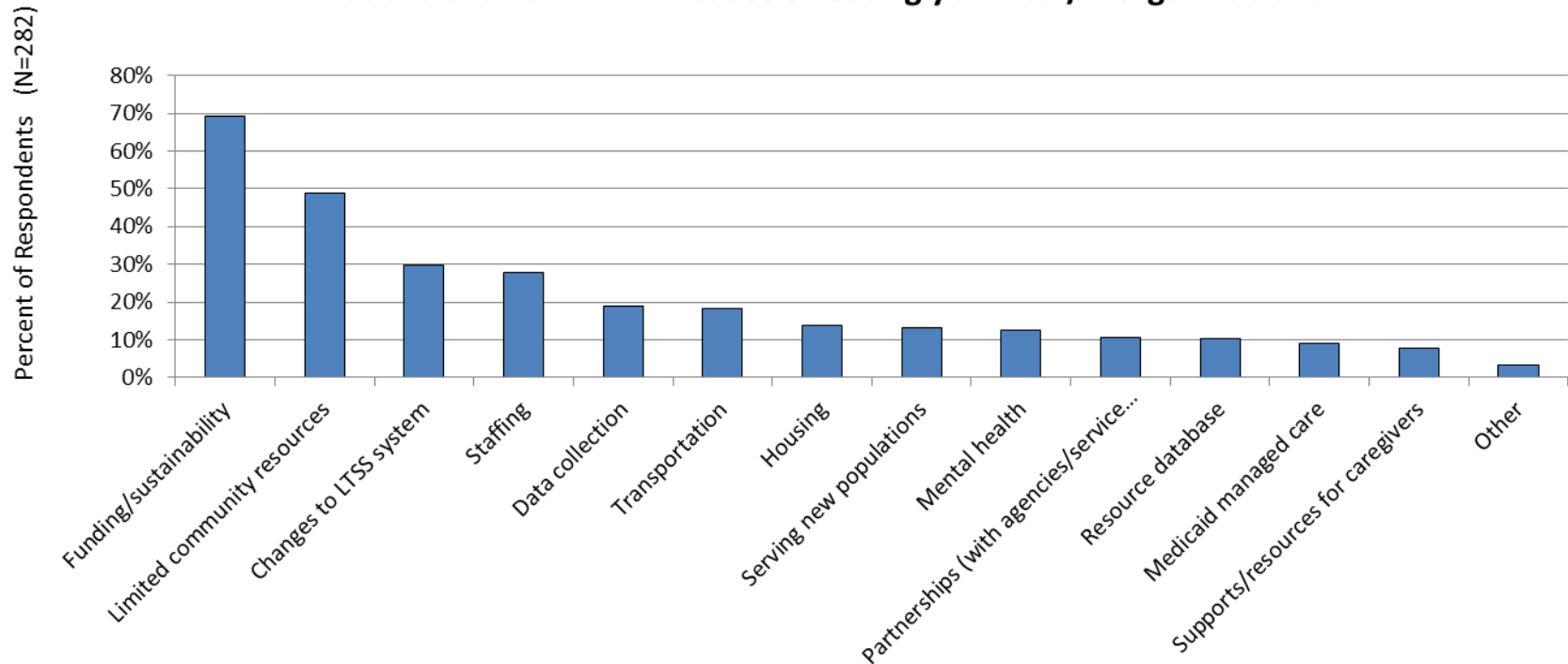- The use of technology in I&R/A service delivery has increased, but there remains room for growth.

2015 Survey Highlights

Changing Needs, Changing Roles

What are the TOP THREE issues affecting your I&R/A organization?

Most Frequently Requested I&R/A Services
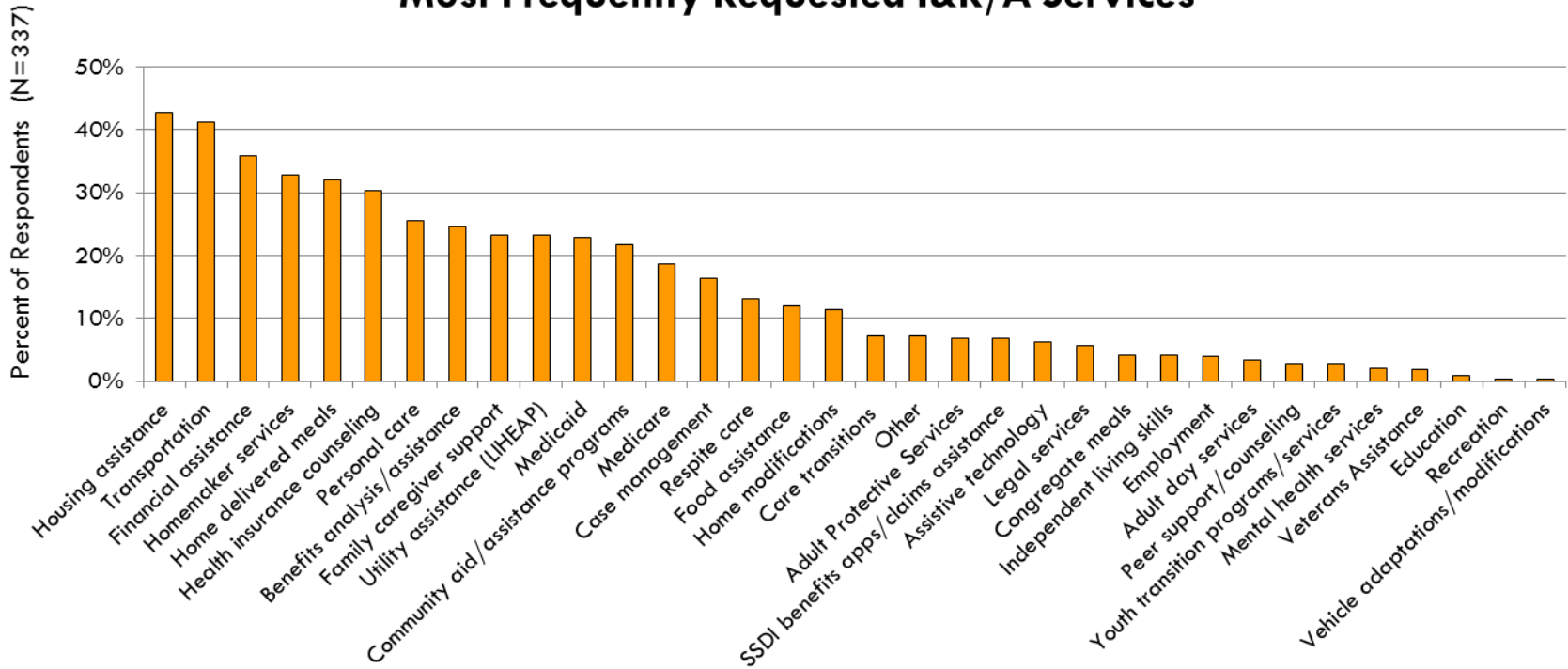
2015 Survey Highlights:
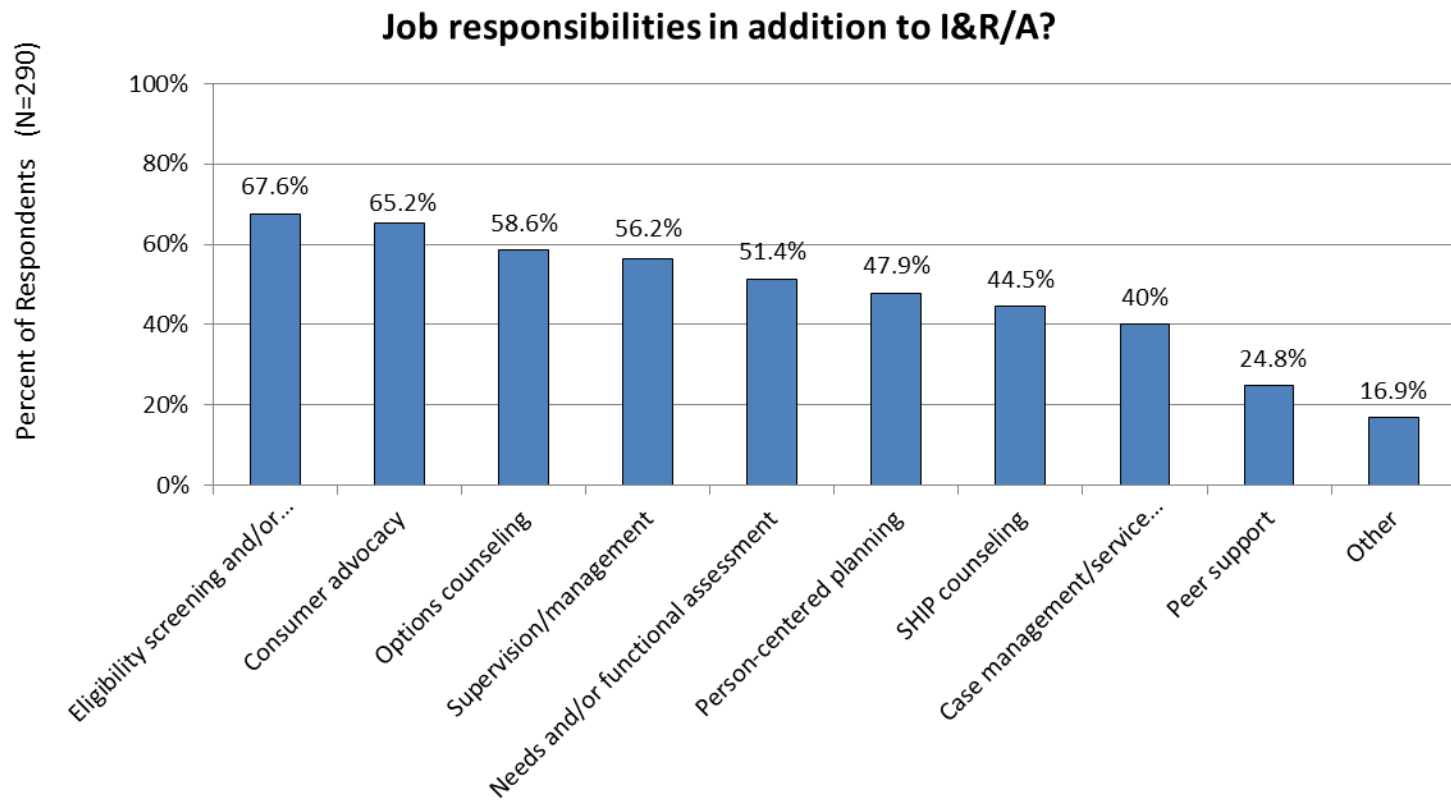# Most frequent unmet service needs

Most Frequent Unmet Service Needs
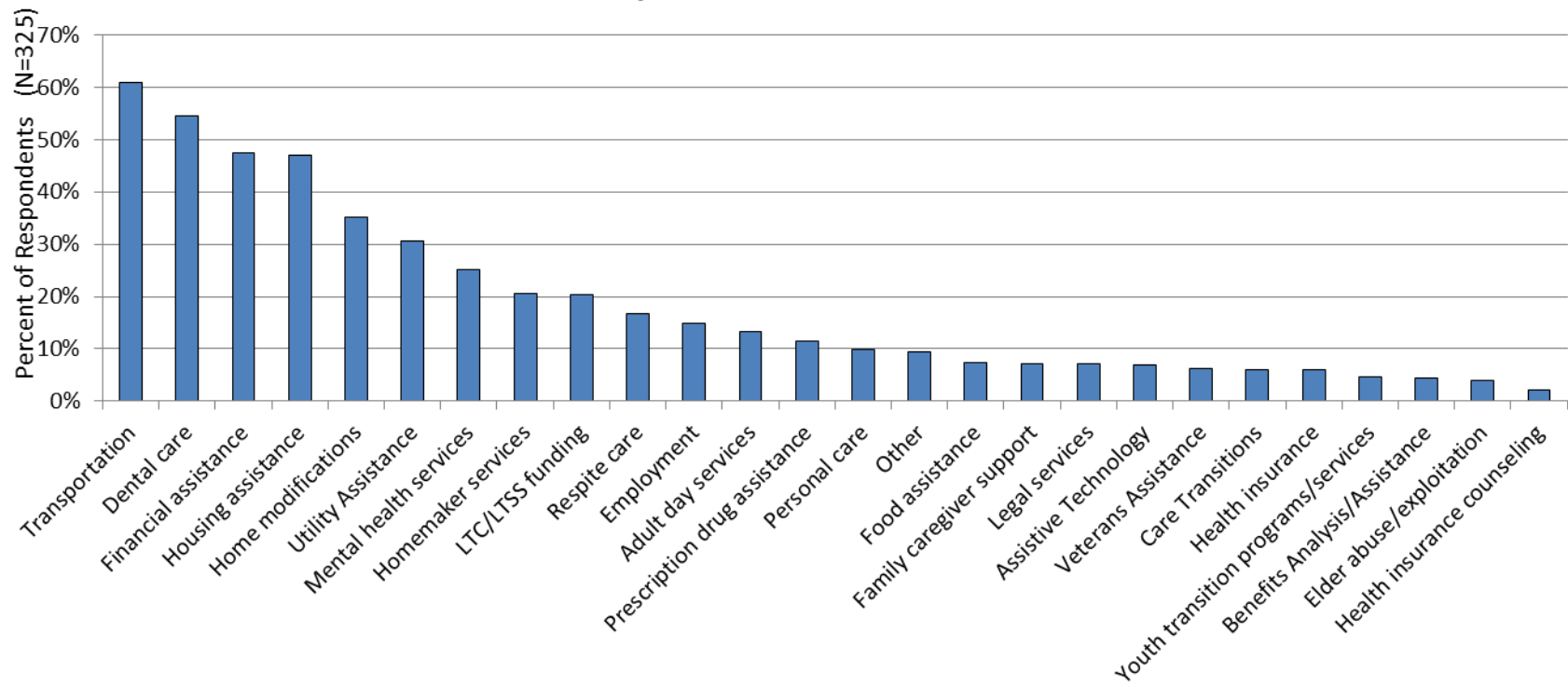
2015 Survey Highlights: Changing caseload demographics

- More inquirers with disabilities under age 60
- Serving more individuals with disabilities of all ages
- More inquirers over age 60 (more baby boomers in need of assistance & services)
- More inquiries seeking services for individuals age 80+
- Increase in inquiries from individuals with mental health conditions
- More inquiries related to services for individuals with dementia
- Increase in caregivers seeking information
- More inquirers with complex (and multiple) conditions and needs
- More calls relating to in-home supports/long-term services and supports
- More inquirers needing financial assistance; needing help with housing
- Overall, the volume of inquiries has increased

# 2015 Survey Highlights: Specialists have complex roles

Job responsibilities in addition to I&R/A?

Percent of Respondents (N=290)

- Eligibility screening and/or... — 67.6%
- Consumer advocacy — 65.2%
- Options counseling — 58.6%
- Supervision/management — 56.2%
- Needs and/or functional assessment — 51.4%
- Person-centered planning — 47.9%
- SHIP counseling — 44.5%
- Case management/service... — 40%
- Peer support — 24.8%
- Other — 16.9%

2015 Survey Highlights

Partnerships and Networks Continue to Evolve

2015 Survey Highlights: ADRC Networks

Is your agency a partner in an ADRC network?

No, 10.2%

Yes, 89.8%
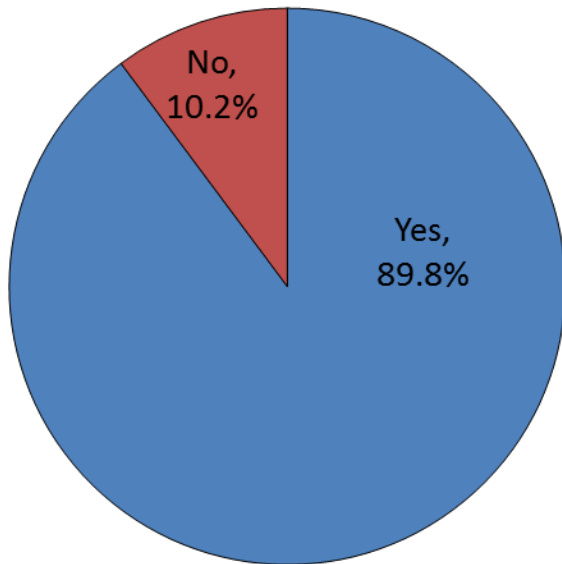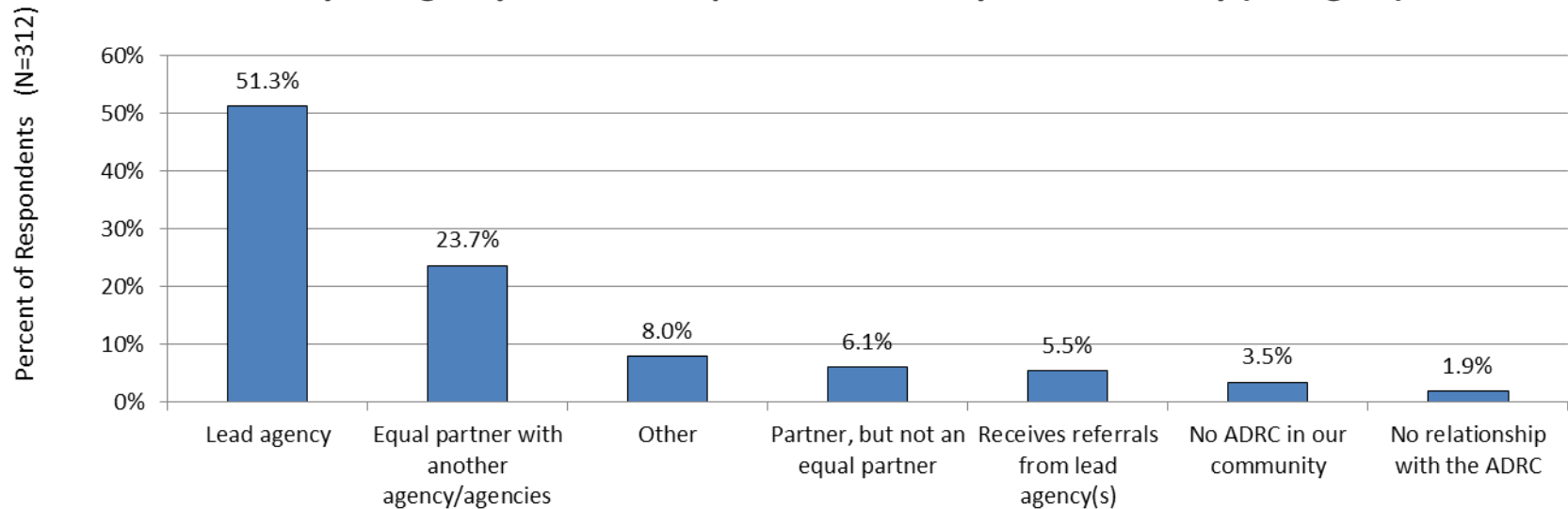
Percent of Respondents
N=313

If your agency is a partner in an ADRC network, does your agency provide I&R/A services within this ADRC network?
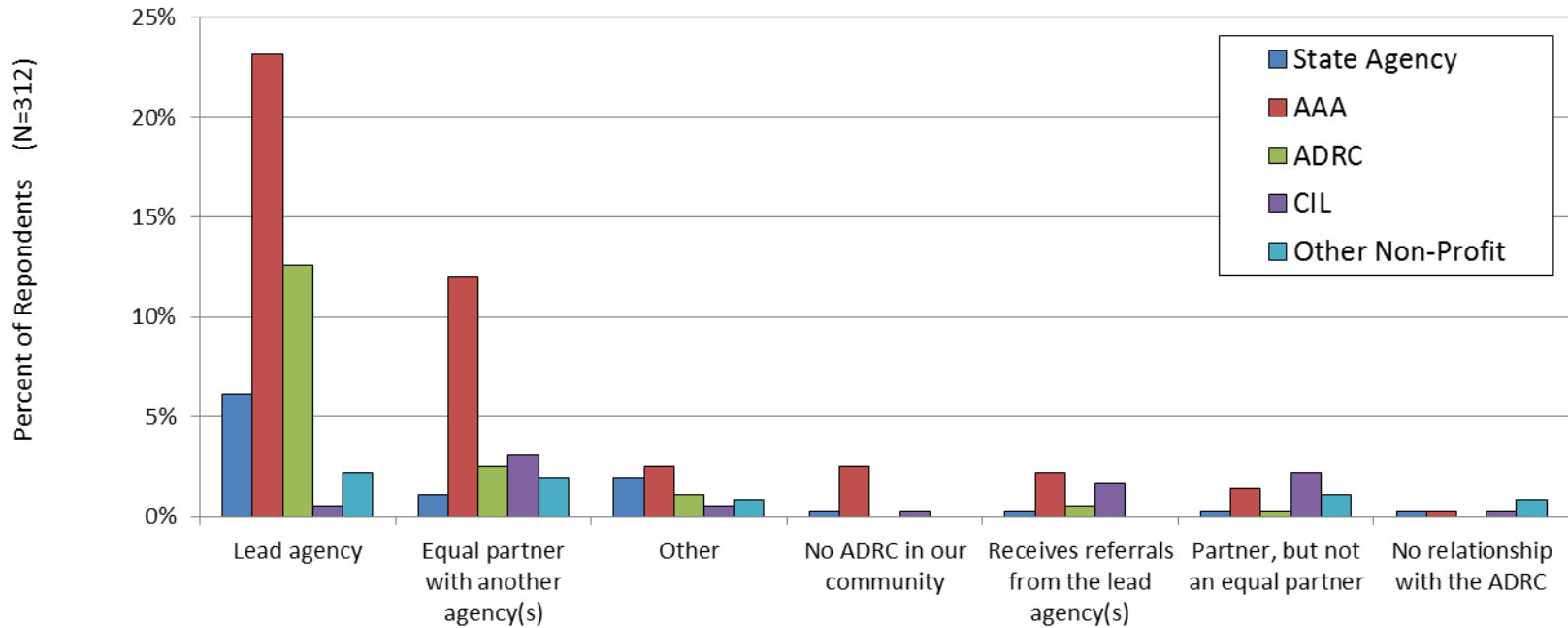
No, 4.7%

Do not know, 3.9%

Yes, 91.4%
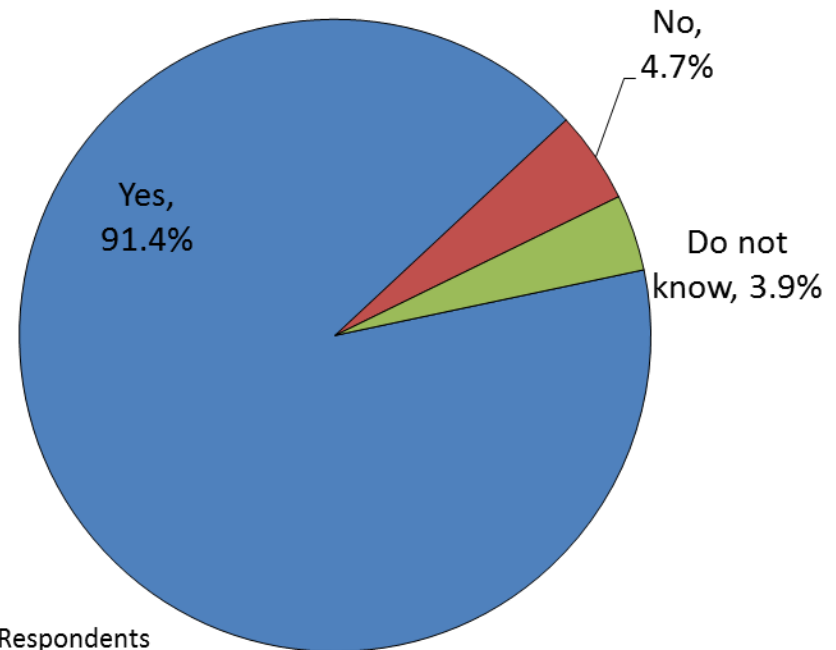
Percent of Respondents
N=279

2015 Survey Highlights: ADRC Networks

Describe your agency's relationship to the ADRC in your community (or region):

Bar chart showing Percent of Respondents (N=312):
- Lead agency: 51.3%
- Equal partner with another agency/agencies: 23.7%
- Other: 8.0%
- Partner, but not an equal partner: 6.1%
- Receives referrals from lead agency(s): 5.5%
- No ADRC in our community: 3.5%
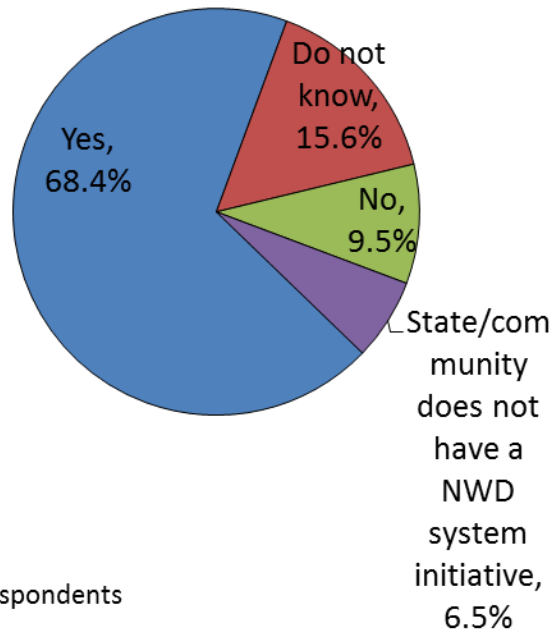- No relationship with the ADRC: 1.9%

Describe your agency's relationship to the ADRC in your community (or region):
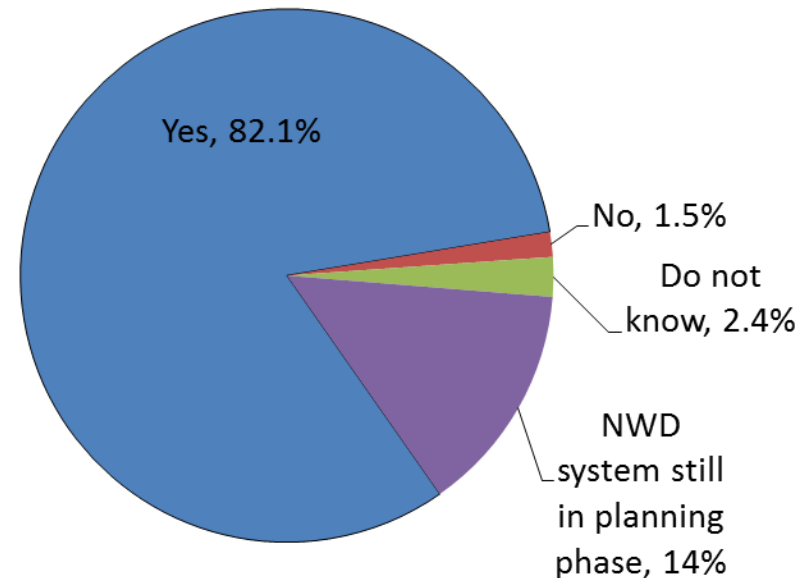
2015 Survey Highlights: No Wrong Door (NWD) Systems

Does your agency participate in a No Wrong Door system initiative?

Yes, 68.4%

Do not know, 15.6%

No, 9.5%

State/community does not have a NWD system initiative, 6.5%

Percent of Respondents N=307

(If your agency participates in a NWD system initiative) Does your agency provide I&R/A services within this NWD system?

Yes, 82.1%

No, 1.5%

Do not know, 2.4%

NWD system still in planning phase, 14%

Percent of Respondents N=207

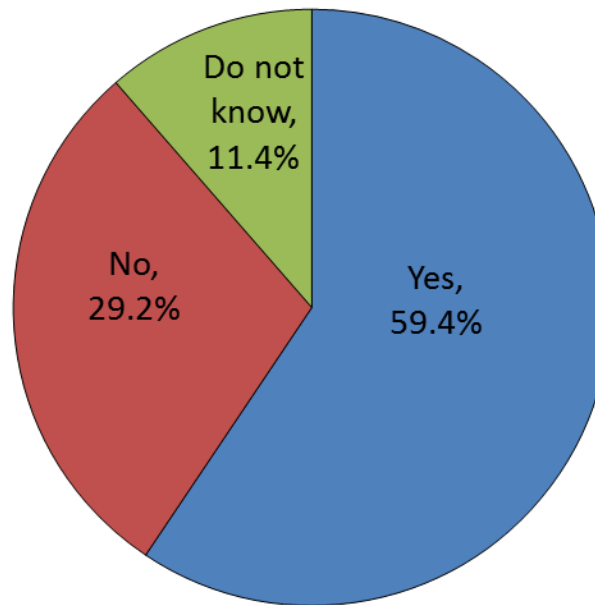# 2015 Survey Highlights: NWD roles

What roles are agencies playing in NWD systems?

- Lead agency
- Similar to ADRC; ADRC functions as a NWD system
- In the NWD planning process (ACL planning grant)
- I&R, Options Counseling, Person-Centered Planning…
- Eligibility assessment
- Evolving…new….roles in a NWD system are still developing
- Participating through the Balancing Incentive Program
- Striving to be a NWD for all inquirers

Does your agency collaborate with 211?

- Do not know, 11.4%
- No, 29.2%
- Yes, 59.4%
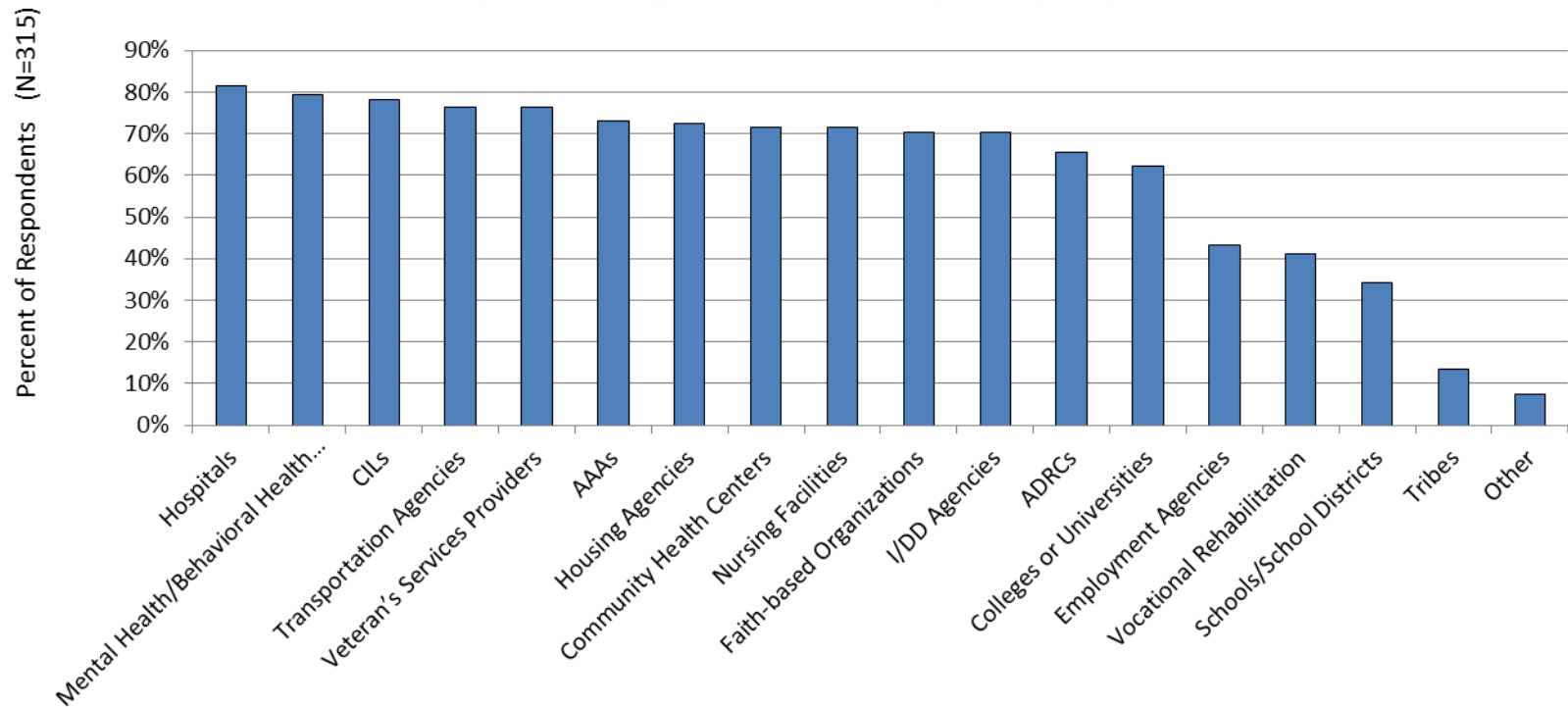
Percent of Respondents
N=315

2015 Survey Highlights: Partnerships with 211

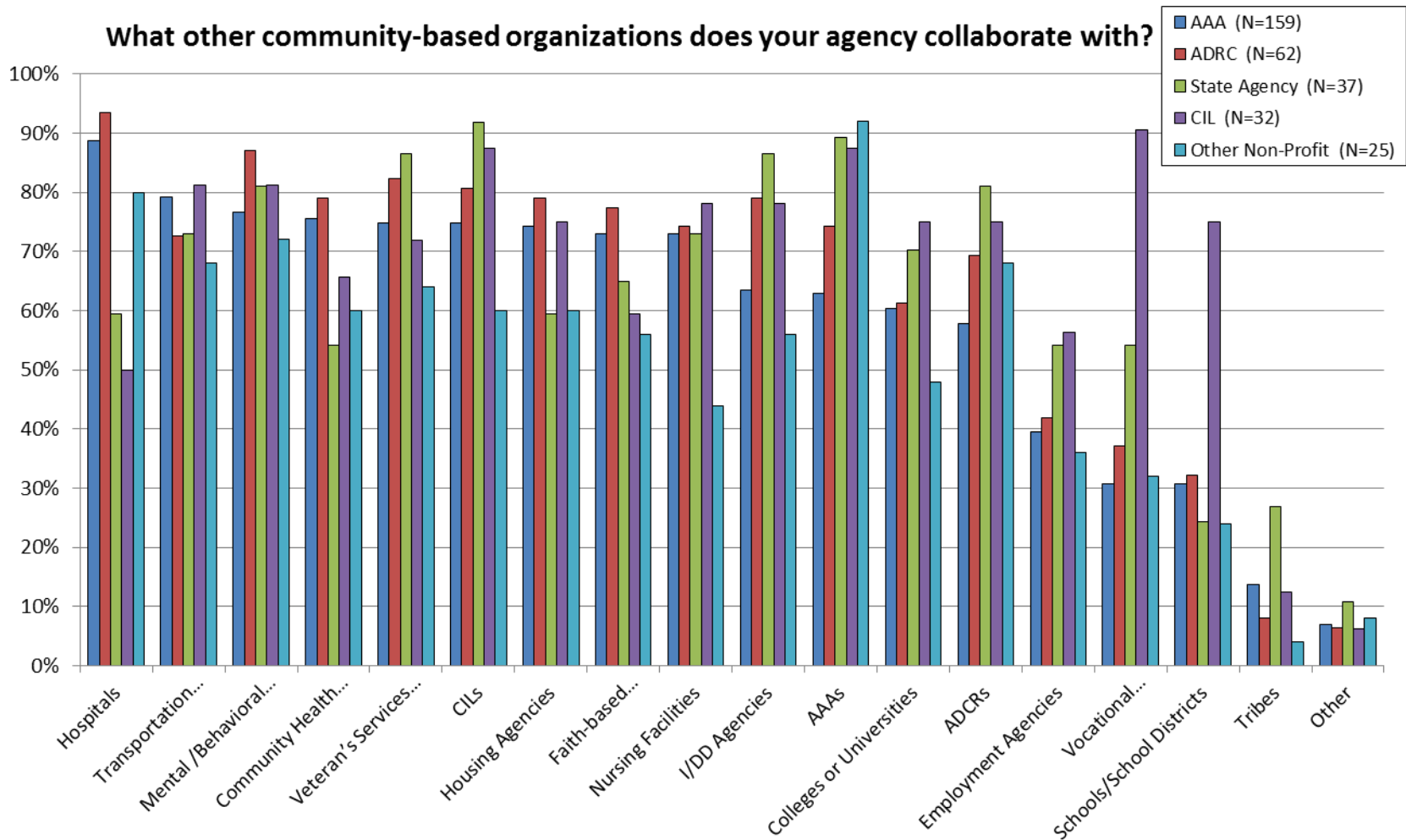On which activities does your agency collaborate with 211?
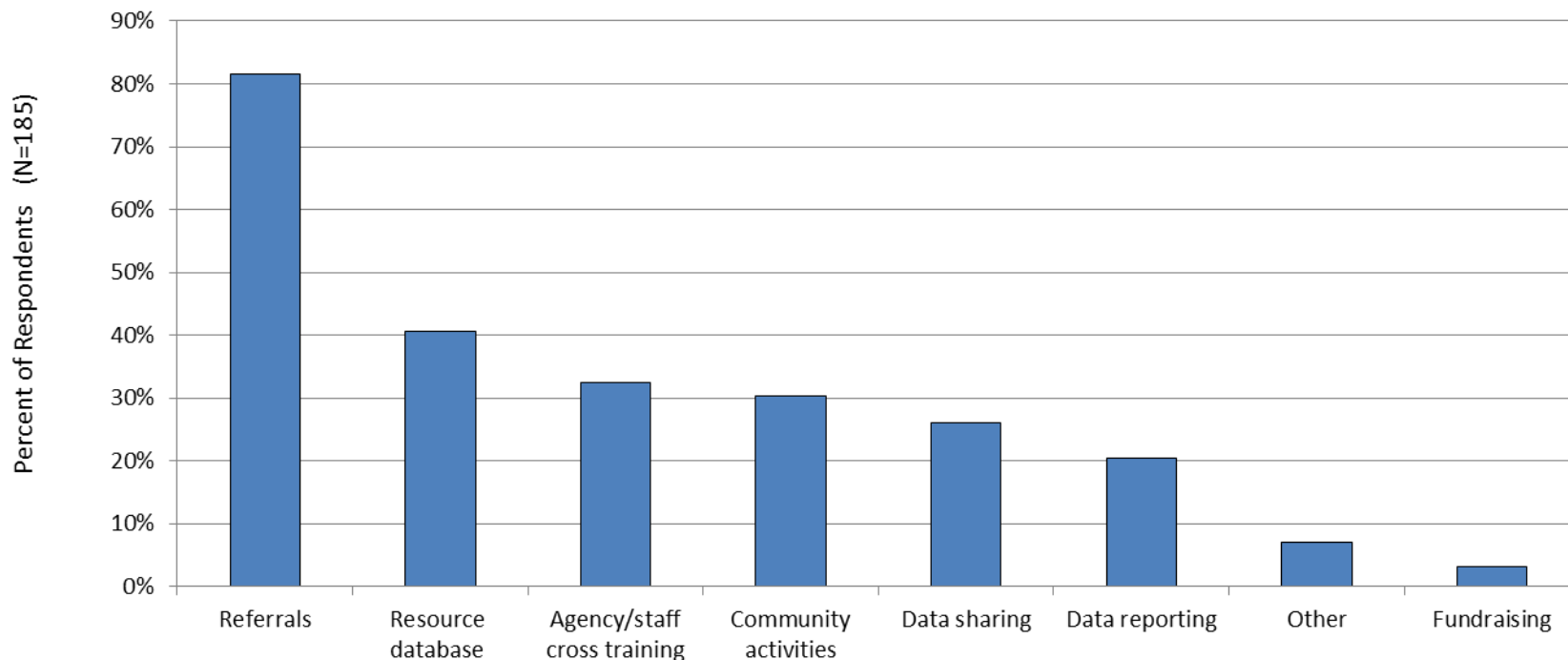
2015 Survey Highlights: Community Partnerships

What other community-based organizations does your agency collaborate with?

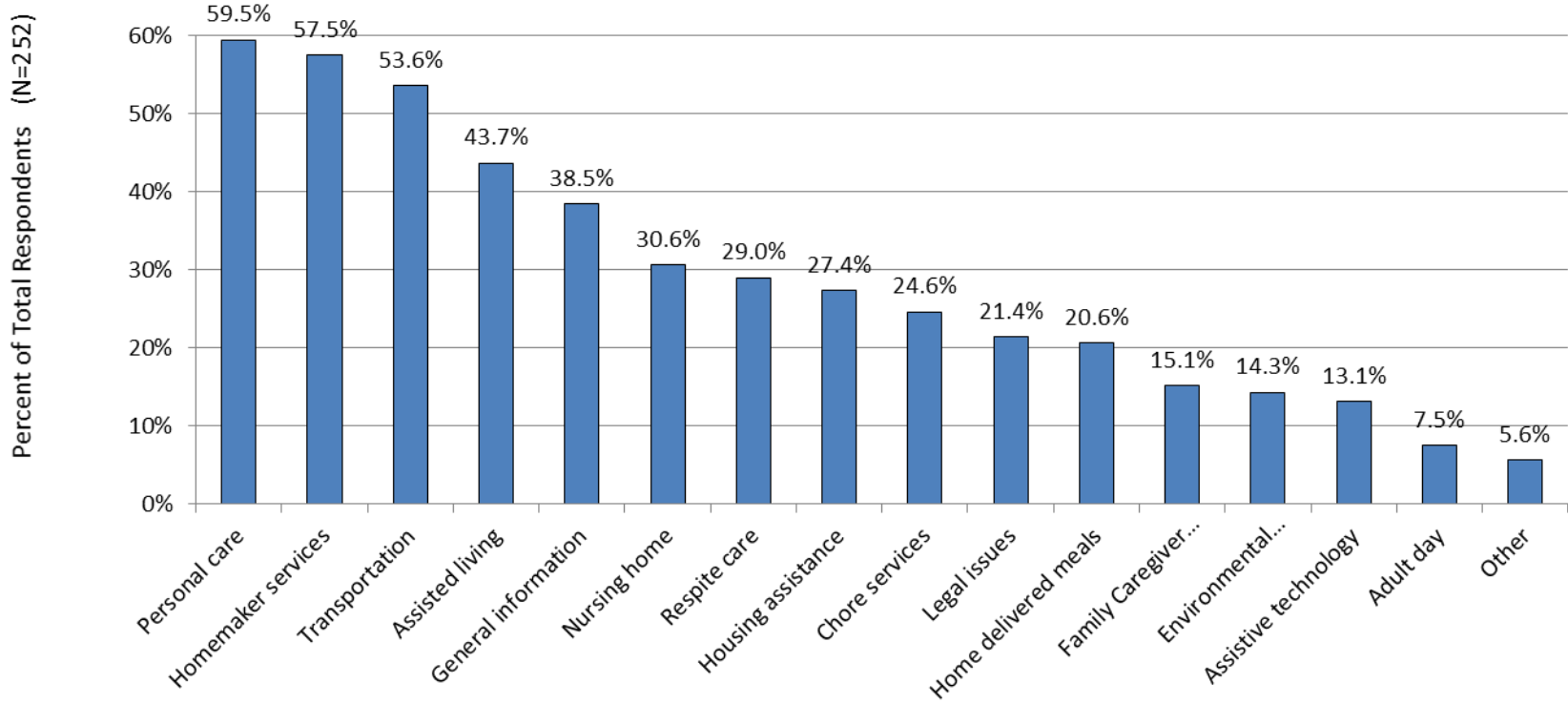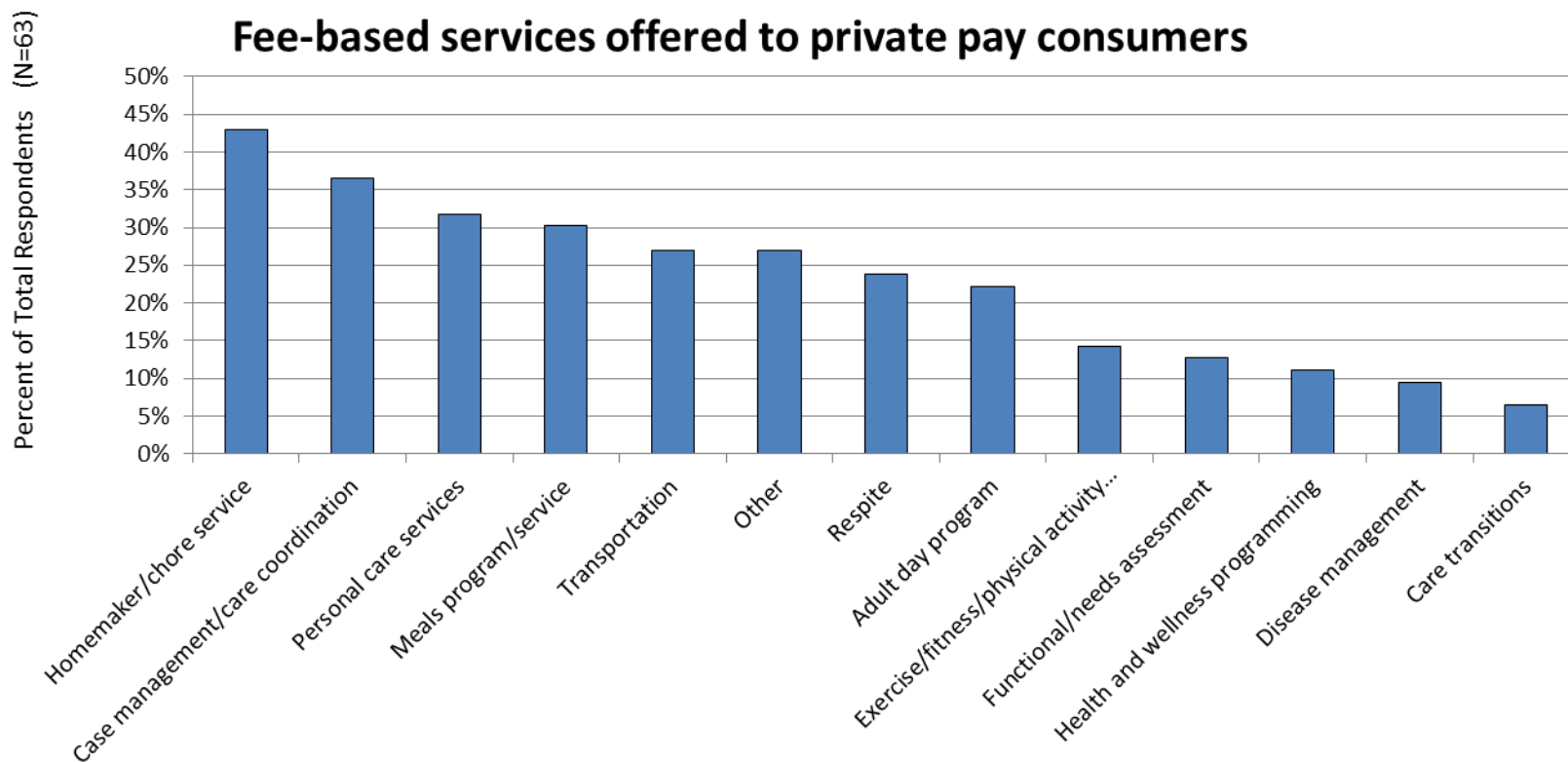# 2015 Survey Highlights: Community partnerships by agency type

What other community-based organizations does your agency collaborate with?

2015 Survey Highlights

Addressing Sustainability: Expanding Roles for I&R/A Agencies

Most Frequent Private Pay Service Requests

Percent of Total Respondents (N=252)

Service	Percent
Personal care	59.5%
Homemaker services	57.5%
Transportation	53.6%
Assisted living	43.7%
General information	38.5%
Nursing home	30.6%
Respite care	29.0%
Housing assistance	27.4%
Chore services	24.6%
Legal issues	21.4%
Home delivered meals	20.6%
Family Caregiver...	15.1%
Environmental...	14.3%
Assistive technology	13.1%
Adult day	7.5%
Other	5.6%

2015 Survey Highlights: Fee-Based Services

Fee-based services offered to private pay consumers

Which of the following services does your agency provide to consumers enrolled in a Medicaid Waiver program?
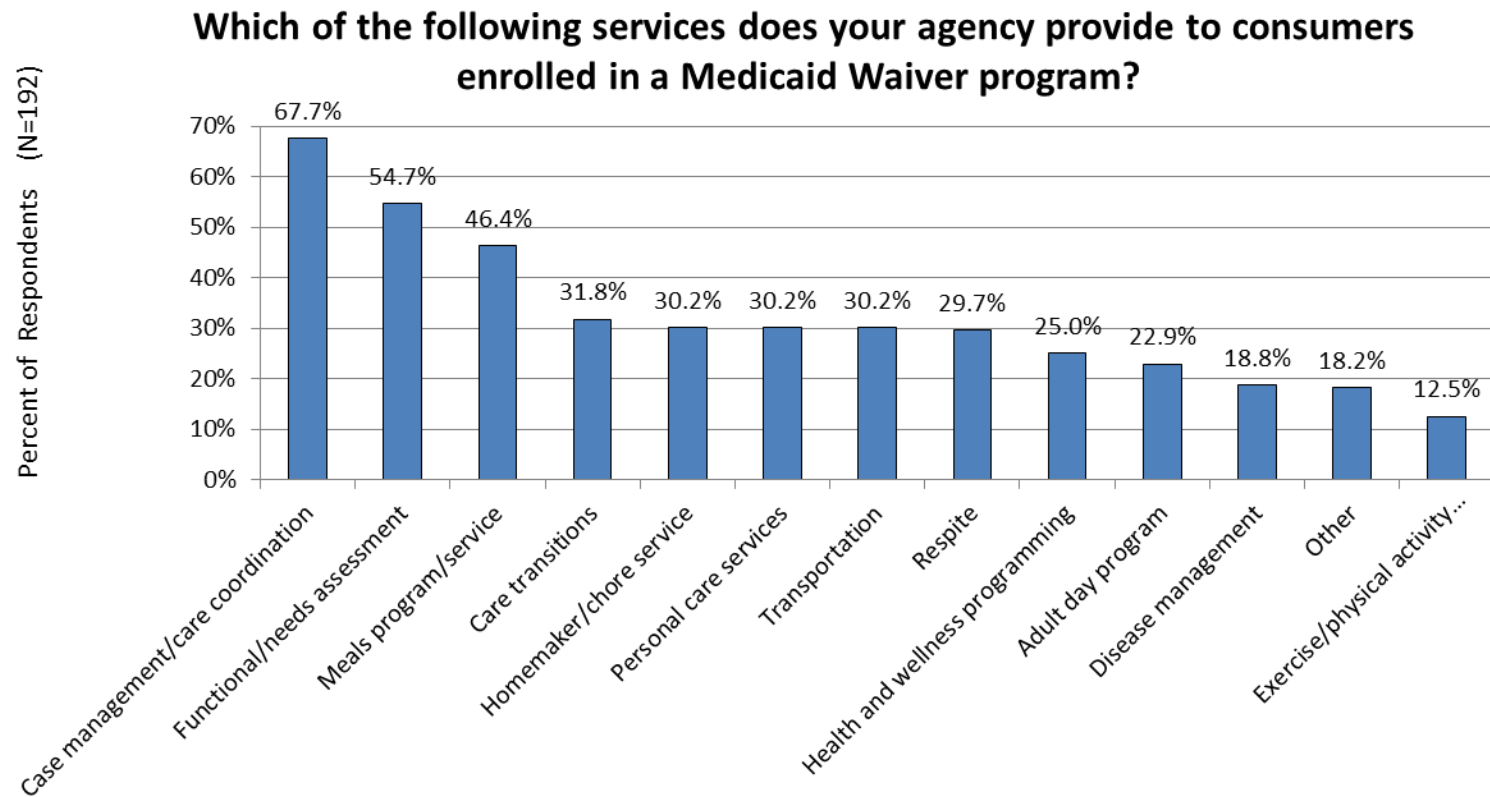
2015 Survey Highlights: Expanding roles in MLTSS

If your agency operates in a state that uses managed care to deliver Medicaid services: Does your agency provide any of the following roles for the state agency?
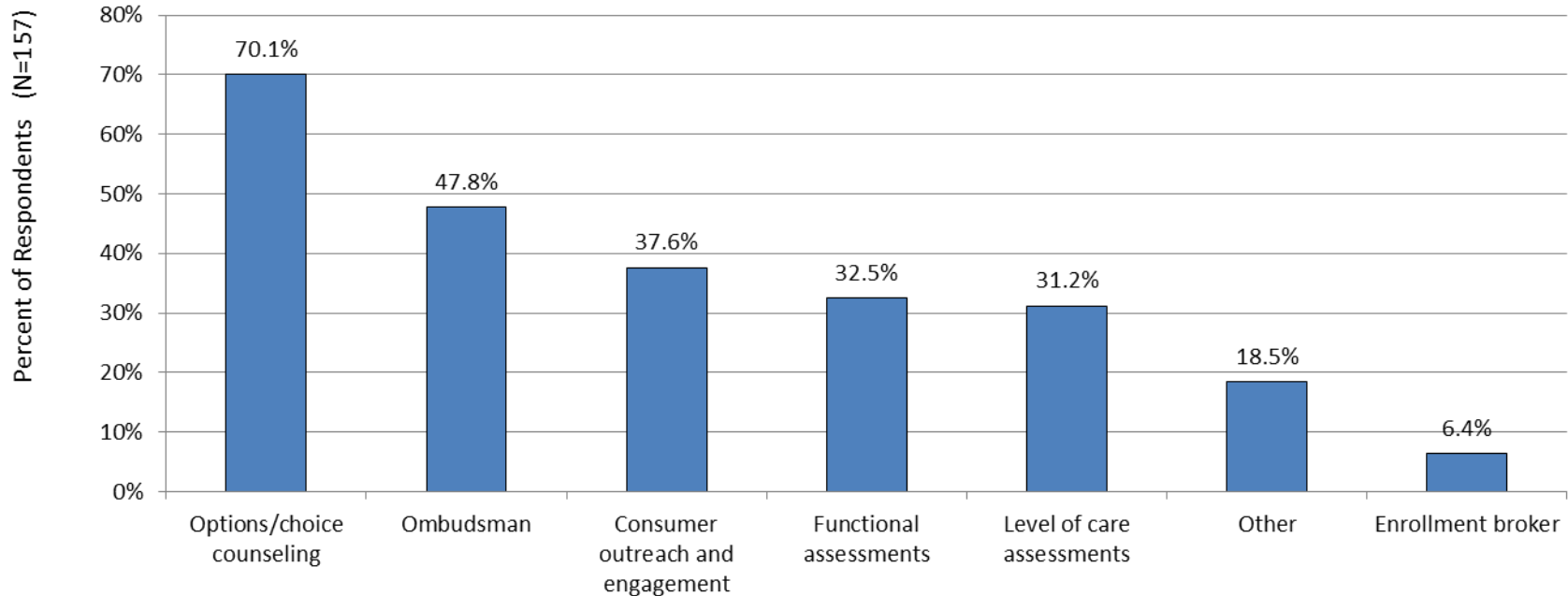
2015 Survey Highlights: Care Transitions

There is broad participation in care transitions. Roles & programs include:

- Participation in Money Follows the Person demonstrations

- Community-based Care Transitions Program (CCTP)

- Case management and care coordination

- Options counseling

- Information and assistance services

- Outreach to residents

- Partnerships with hospitals

- MDS Section Q referrals/local contact agency

- Part of everyday work; CIL core service (transition specialists)

2015 Survey Highlights: Diversion Programs

Some agencies also reported participating in diversion programs. Roles include:

- Case management and service coordination

- Screening and assessments

- Options counseling

- HCBS waiver services/programs

- Provide homemaker services; in-home services and meals

- Family caregiver support

- Referrals to community resources/waivers; I&A

- CIL mission to help people stay in the community ("we help people run their own lives")

2015 Survey Highlights: Youth transition programs

NATIONAL INFORMATION & REFERRAL SUPPORT CENTER I&R

Many fewer respondents reported participating in youth transition programs. Roles include:

- Independent living skills assessment and training
- Participation in IEP meetings; assistance with transition planning
- Partnerships with school districts and Vocational Rehabilitation
- I&R (to community resources, employment services, education & training…)
- Parent education & advocacy; youth empowerment
- Support for transition to adult service system
- Disability Mentoring Day
- Work-based learning; summer job readiness programs

Transition is a CIL core service, but is a new service for some respondents who reported still planning and developing youth transition services.

2015 Survey Highlights: Meeting the sustainability challenge

- Serving new populations (e.g. veterans, younger individuals with disabilities)
- Building new partnerships (e.g. for-profits, employers); leveraging existing ones
- Creating efficiencies in operations (e.g. sharing an I&R resource database)
- Using technology to modernize business practices (e.g. chat and text I&R)
- Diversifying sources of revenue (fee-for-service programs, grants, Medicaid billing)
- Contracting with managed care plans
- Providing services in "in-demand" areas (e.g. care transitions)
- System building (ADRC and No Wrong Door planning and implementation)
- Cross-training staff
- Rebranding; creating new organizational models (e.g. a 501c3, a LLC)
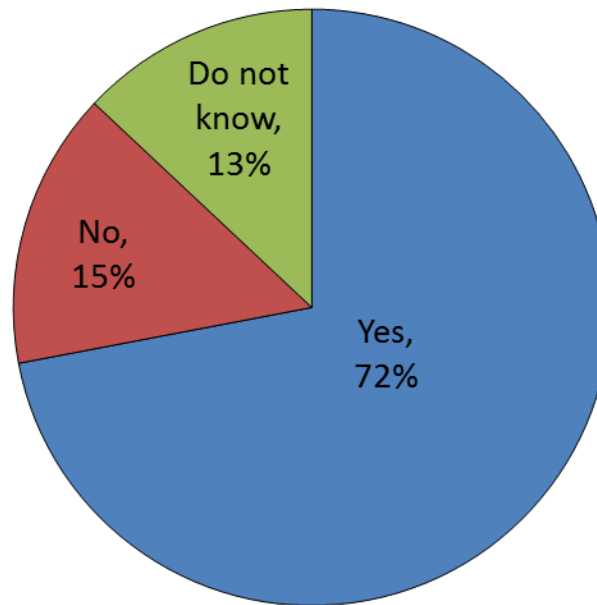- Quality improvement

2015 Survey Highlights

Quality Matters
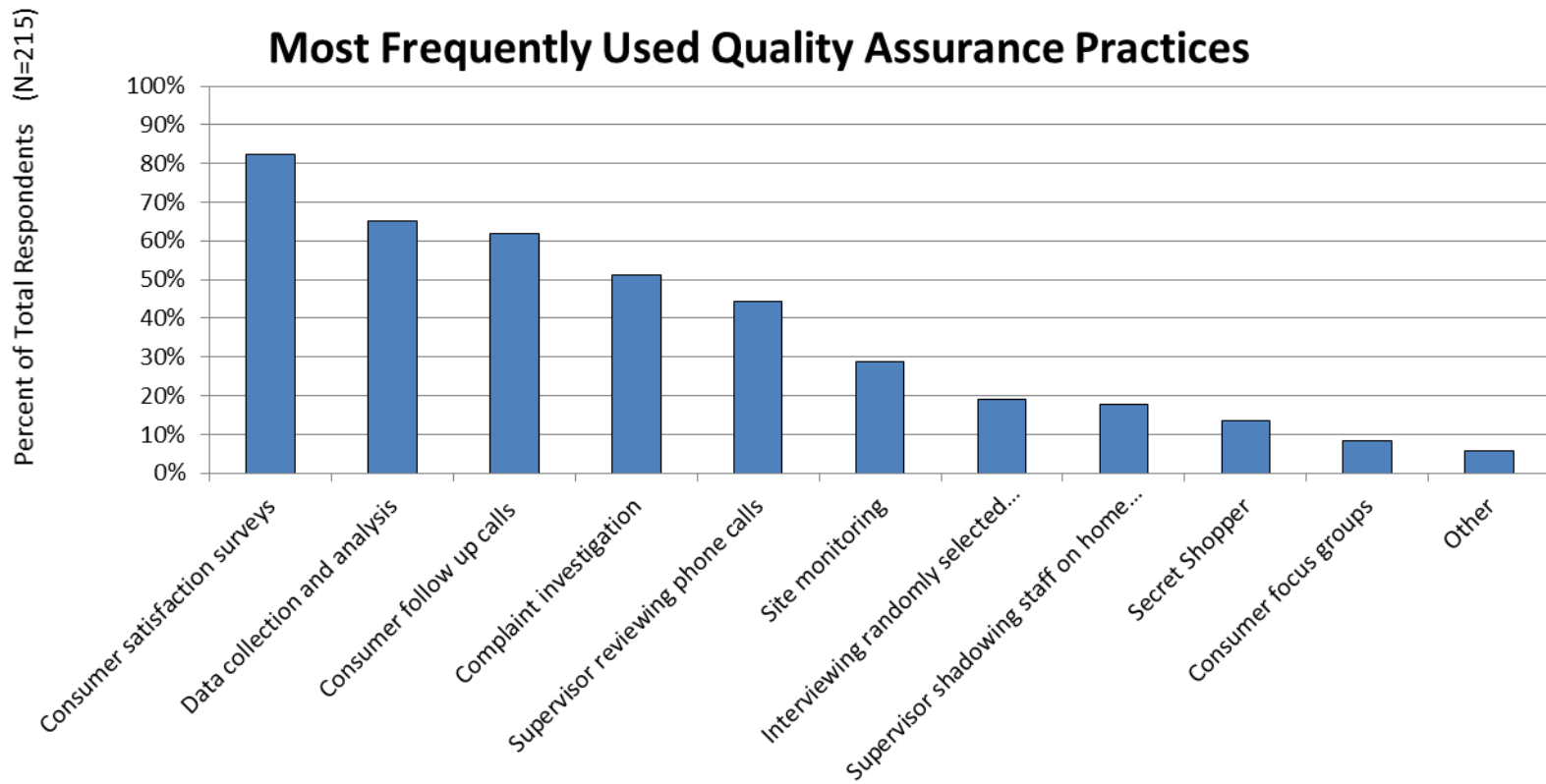
2015 Survey Highlights: Quality Assurance

Does your agency have QA measures for I&R/A services?

Do not know, 13%

No, 15%

Yes, 72%

Percent of Respondents
N=300

2015 Survey Highlights: Quality Assurance measures

Most Frequently Used Quality Assurance Practices

2015 Survey Highlights: Using QA for quality improvement

How does quality assurance support I&R/A quality improvement?

- Informs staff training, coaching, development, and evaluation
- Used to focus training and technical assistance
- Modify or develop policies and procedures accordingly
- Identify gaps in services and service delivery
- Used to improve customer service; adjust service delivery
- Review QA data against standards
- Identify gaps in resource database; inform community of service needs
- Informs outreach and education to the public
- Create action plans for improvement
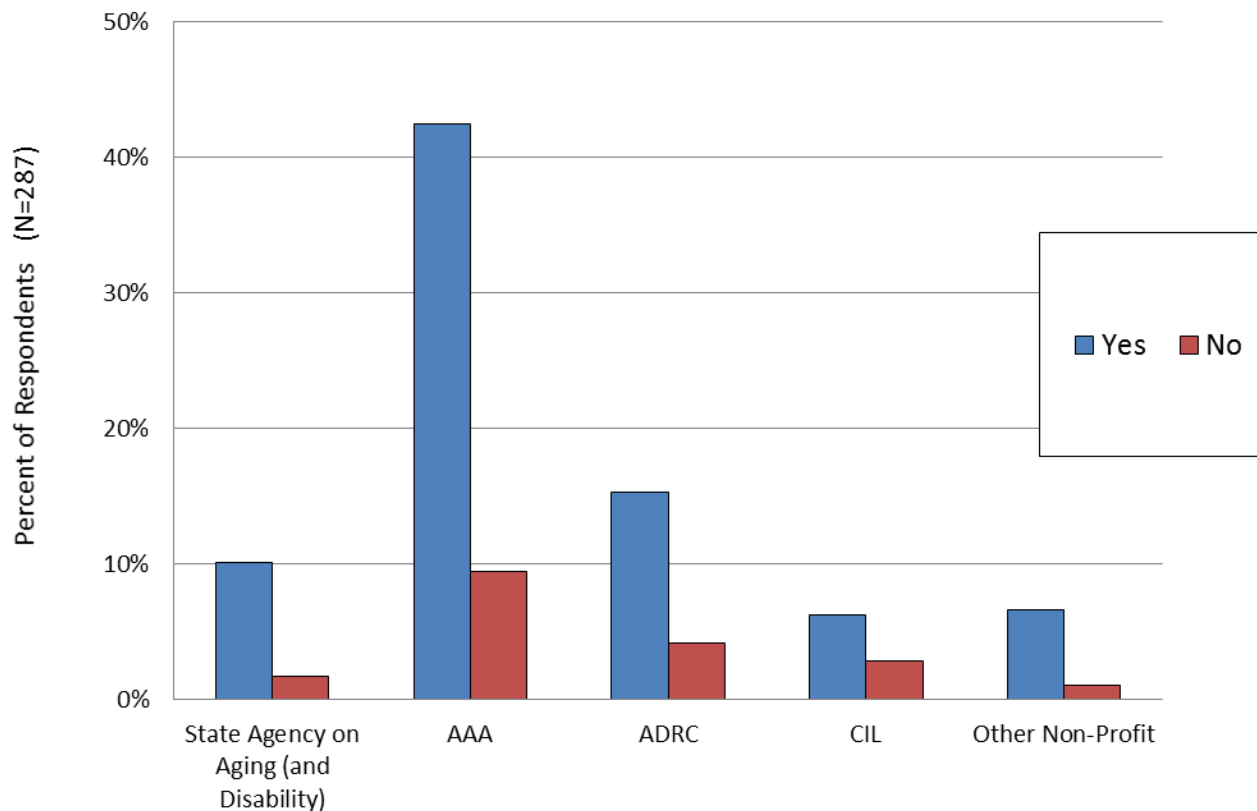
2015 Survey Highlights: Staff Training

Most Frequently Provided I&R/A Training Topics
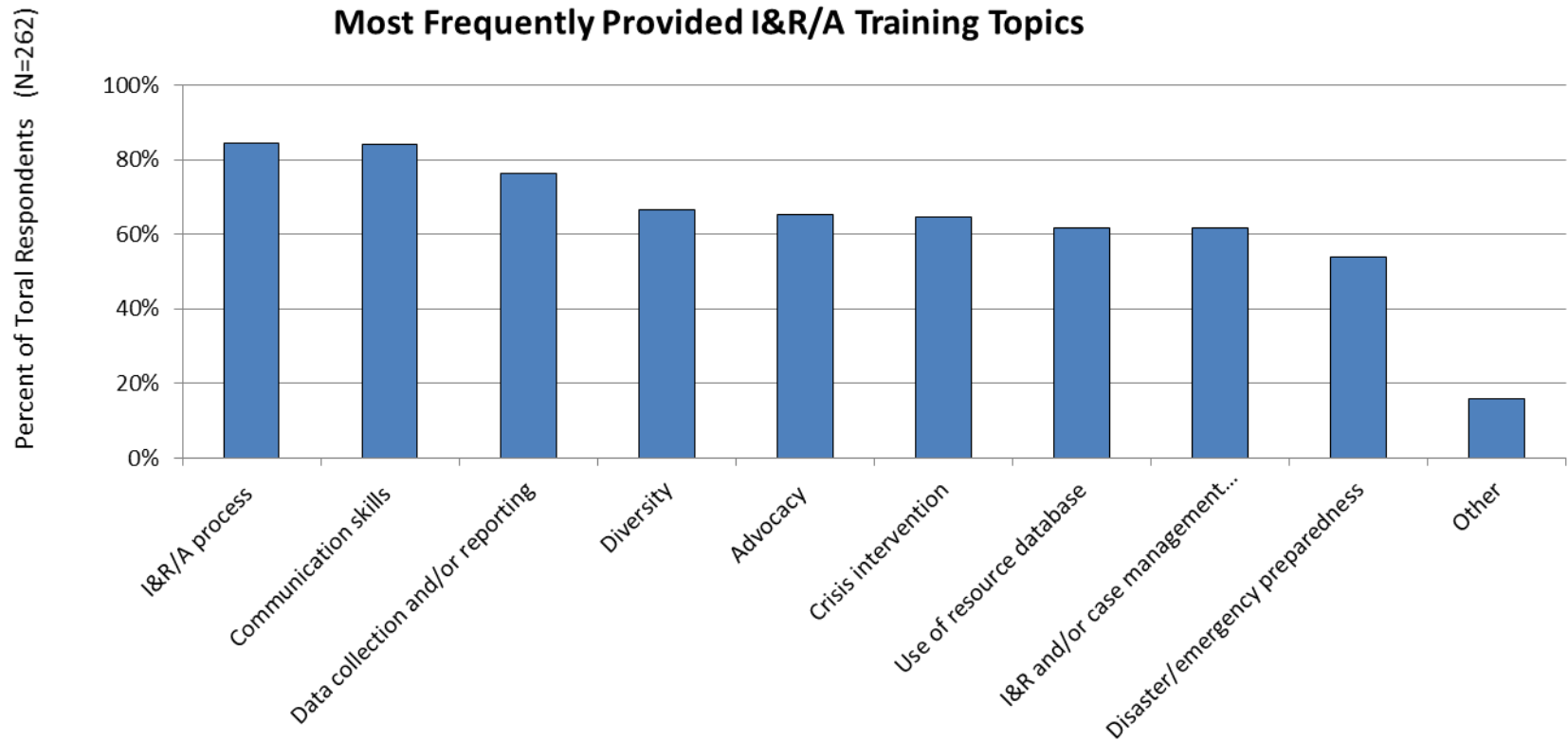
2015 Survey Highlights: Staff cross-training

"Good for one – good for all"

Is your agency participating in aging and disability cross-training?
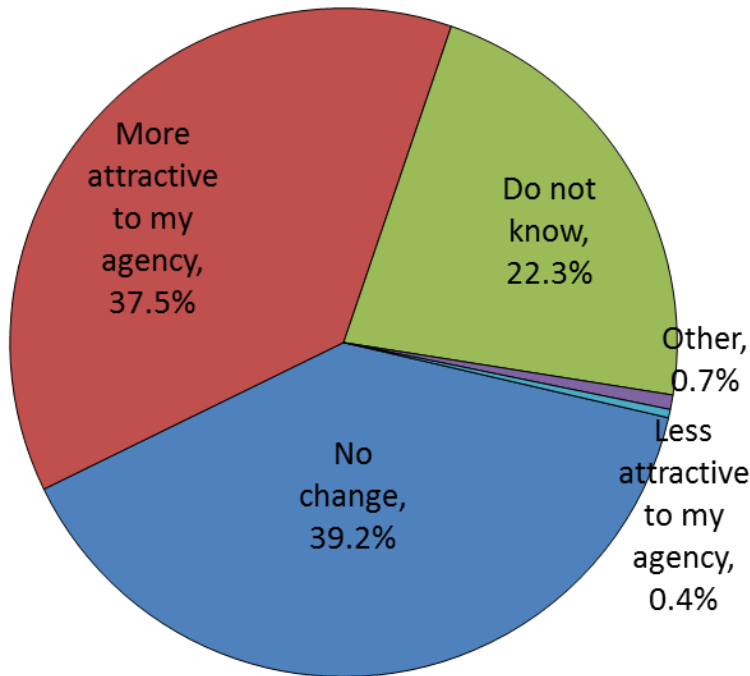
2015 Survey Highlights: Staff certification

I&R/A Specialist Certification Requirements	Percent of Respondents (N=293)
Must become AIRS Certified	44.7%
No certification requirement	22.9%
Percentage of specialists must become AIRS Certified	11.3%
Encouraged, but not required, to become AIRS Certified	8.2%
Must complete training, but not necessarily certification, on certain topics	7.2%
Other	5.1%
Must achieve a non-AIRS certification	0.7%

2015 Survey Highlights:
Staff certification – other considerations

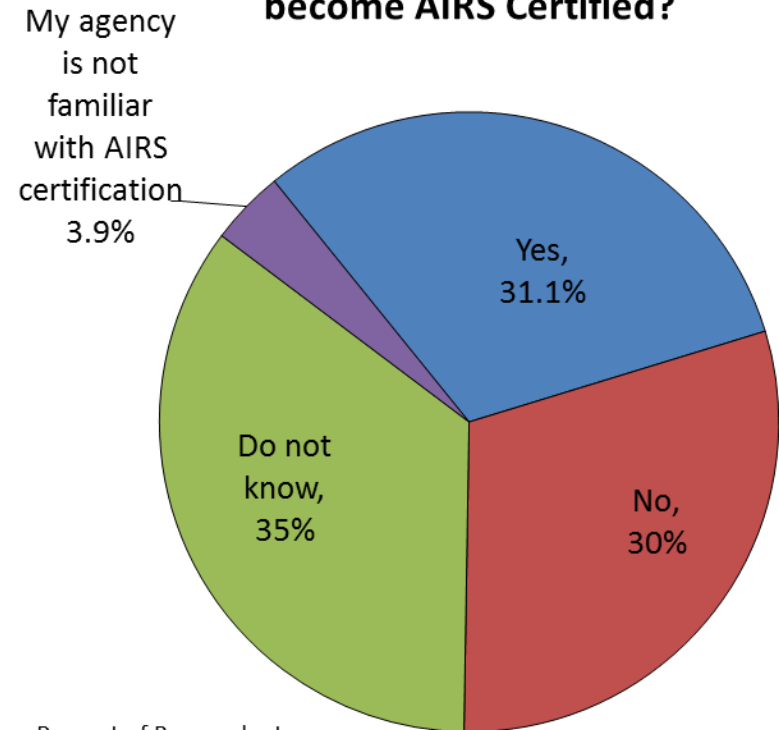| Primary reason agency does not require or encourage AIRS Certification	% of Respondents (N=92)
Cost	26.1%
Other	26.1%
Not aware of AIRS Certification	14.1%
We do not believe that Certification adds value to the agency	7.6%
We do not engage in I&R/A	5.4%
We do not believe that Certification helps quality	5.4%
We require another professional credential	5.4%
Access to certification training	5.4%
I&R/A is not a priority	3.3%
Access to examination sites	1.1%

2015 Survey Highlights: Certification – the new CIRS-A/D

The change from CIRS-A to CIRS-A/D will make AIRS Certification:

- More attractive to my agency, 37.5%
- Do not know, 22.3%
- No change, 39.2%
- Other, 0.7%
- Less attractive to my agency, 0.4%

Percent of Respondents
N=283

With the new CIRS-A/D credential, do you think that your agency will encourage or require additional staff to become AIRS Certified?
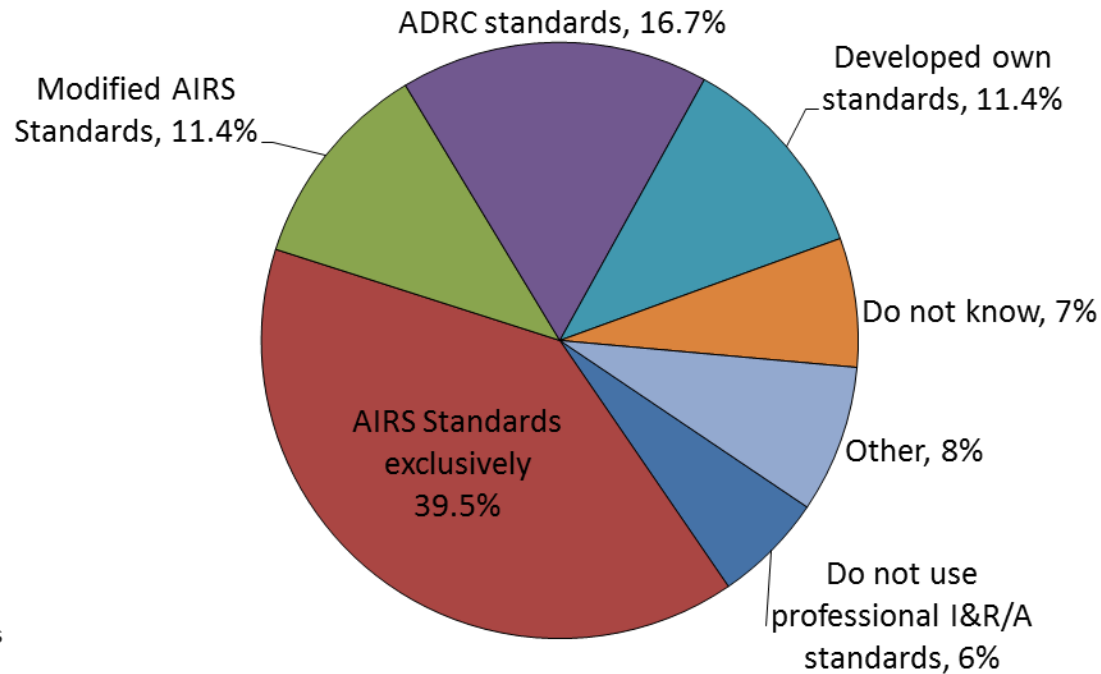
- My agency is not familiar with AIRS certification 3.9%
- Yes, 31.1%
- Do not know, 35%
- No, 30%

Percent of Respondents
N=280

Professional I&R/A standards used by agencies:

ADRC standards, 16.7%

Developed own standards, 11.4%

Modified AIRS Standards, 11.4%

Do not know, 7%

AIRS Standards exclusively 39.5%

Other, 8%

Do not use professional I&R/A standards, 6%

Percent of Respondents N=299

2015 Survey Highlights: AIRS Agency Accreditation

Has your agency attained AIRS Accreditation?

Do not know, 9.7%

Agency has never sought AIRS Accreditation , 11%

Agency currently in process of attaining AIRS Accreditation, 2.7%
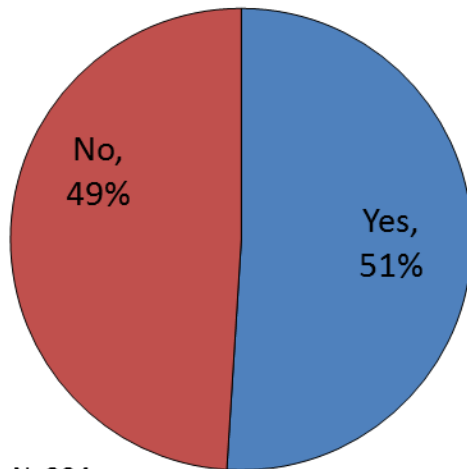
Yes, 36.8%

No, 39.8%
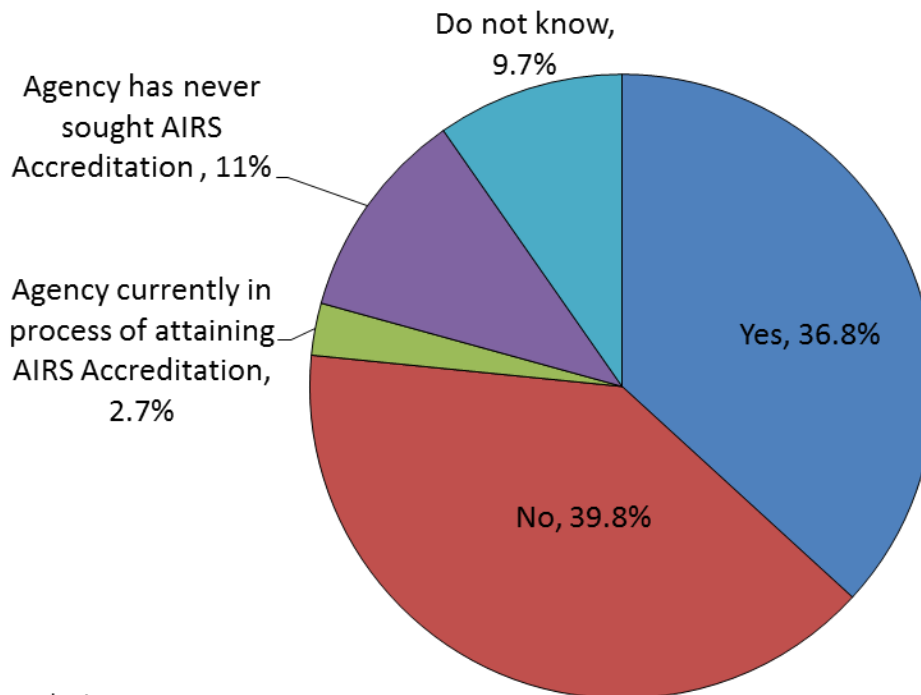
Percent of Respondents
N=299

2015 Survey Highlights

**Use of Technology: Activity has Increased but There is Room for Growth**

2015 Survey Highlights: Social Media

Does your organization use social networking services to connect with consumers, family members, and caregivers? 2012 survey

No, 49%

Yes, 51%

Percent of Respondents N=294

Does your organization use social networking services to connect with consumers, family members, and caregivers? 2015 survey

No, 35.5%

Yes, 64.5%
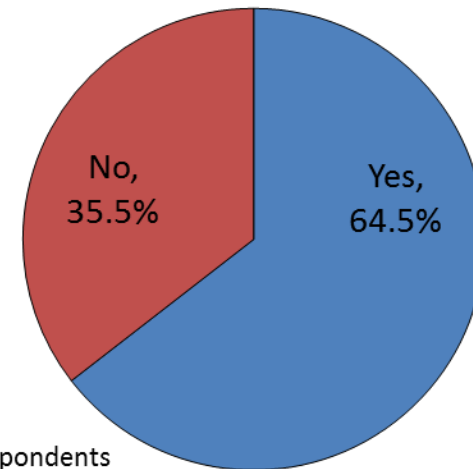
Percent of Respondents N=324

2015 Survey Highlights: Social media activity

**NATIONAL INFORMATION & REFERRAL SUPPORT CENTER**

How has social media activity changed over the past two years?

- Increased activity (notable on Facebook and Twitter)

- Increase in followers and "likes"

- Increase in inquiries stemming from social media

- More individuals initially contacting agencies electronically

- Increase in activity for caregivers who live out of the area

- Increasing response to social media by seniors

- Adding or designating staff for social media

- Using social media more purposefully to engage target audiences

- Working to establish best practices on posting to social media

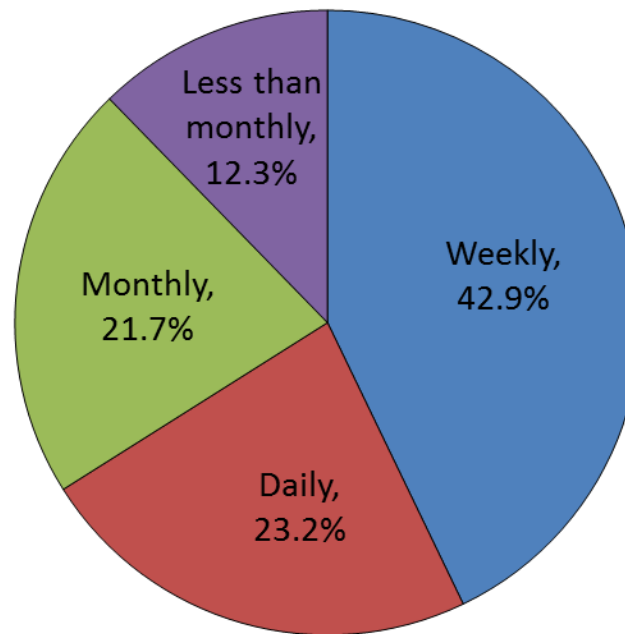# 2015 Survey Highlights: Social networking sites

Social Networking Sites Used by the Aging and Disability Network
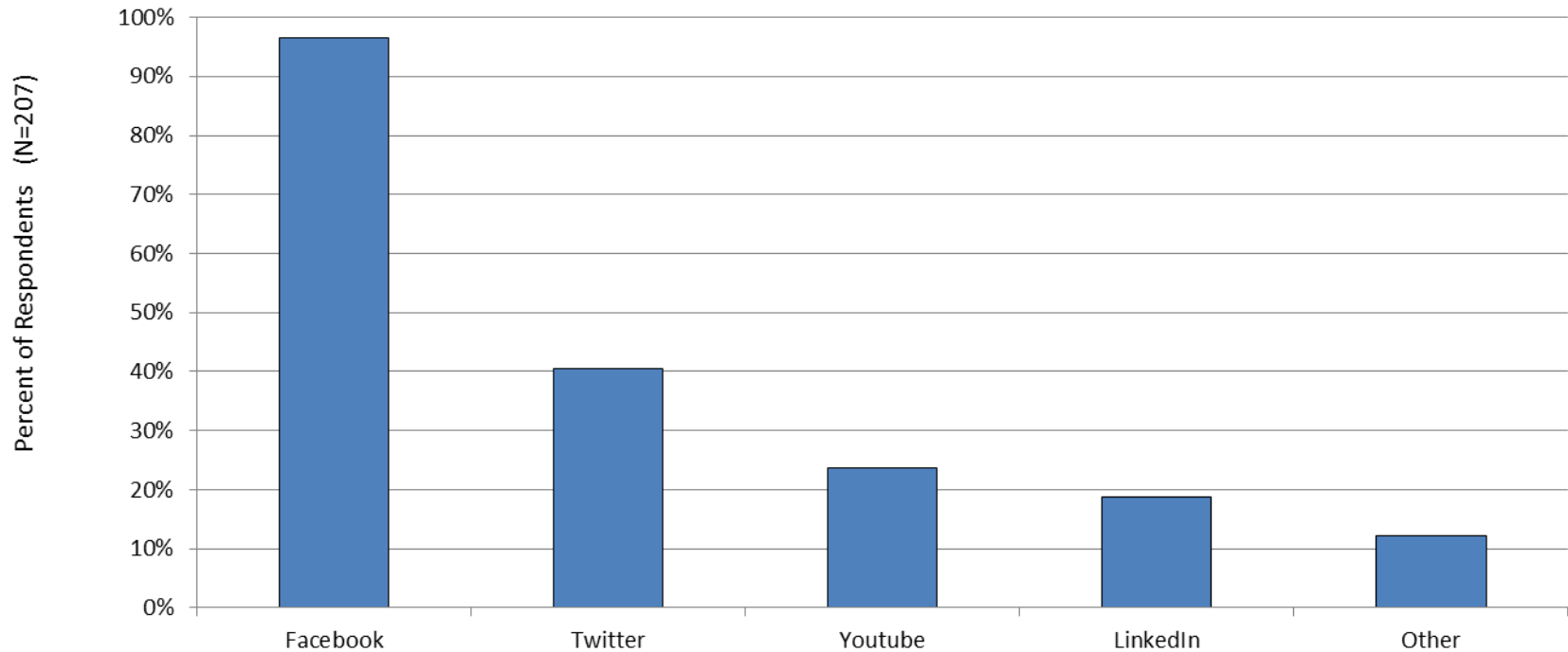
2015 Survey Highlights: Frequency of social media updating

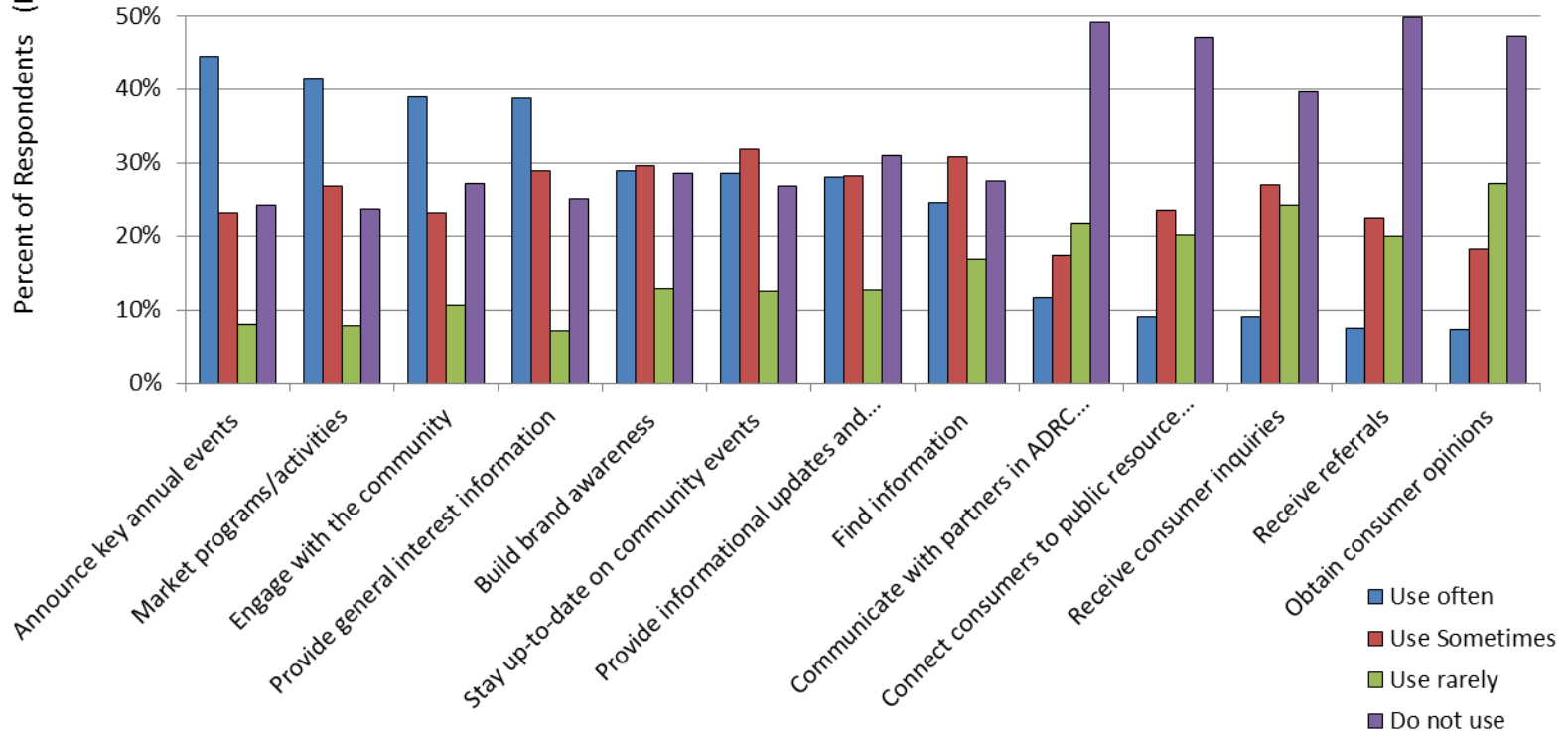**Frequency of Agency Staff Updating Social Networking Sites**

Less than monthly, 12.3%

Monthly, 21.7%

Weekly, 42.9%

Daily, 23.2%

Percent of Respondents
(N=203)

2015 Survey Highlights: Uses of social media

Agency Uses of Social Media:

Reasons organizations are not participating in any social networking websites

Bar chart showing Percent of Respondents (N=111):
- Don't have time to maintain site: ~39%
- Other: ~37%
- Against company policy: ~23%
- Firewalls block those sites: ~19%
- Staff lack necessary technical skills or training: ~19%
- Not useful to clients: ~18%
- Fear of legal issues: ~6%
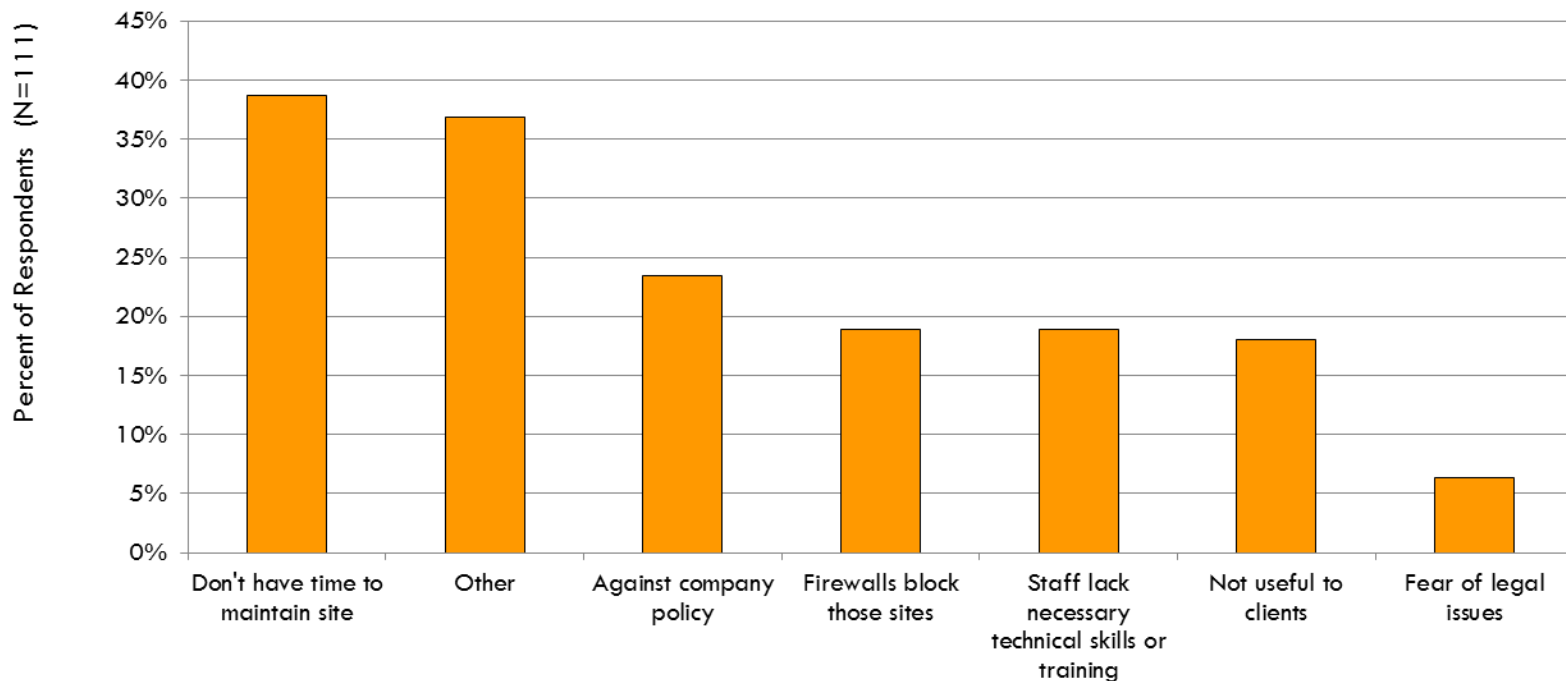
2015 Survey Highlights:
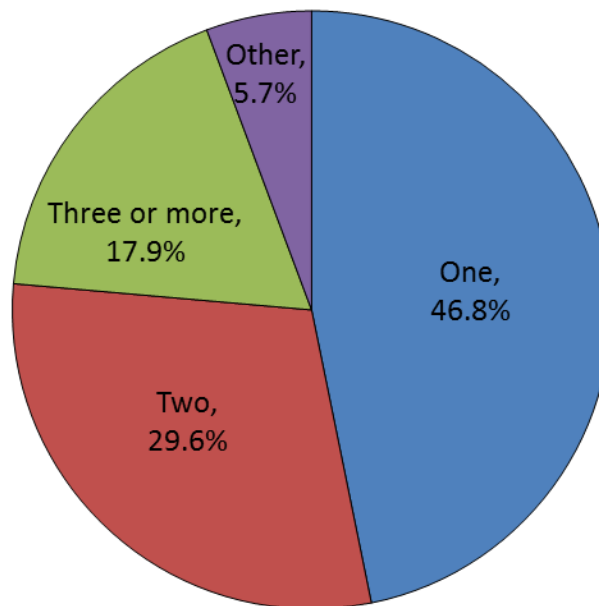# I&R service delivery modalities

Settings for I&R/A Provision
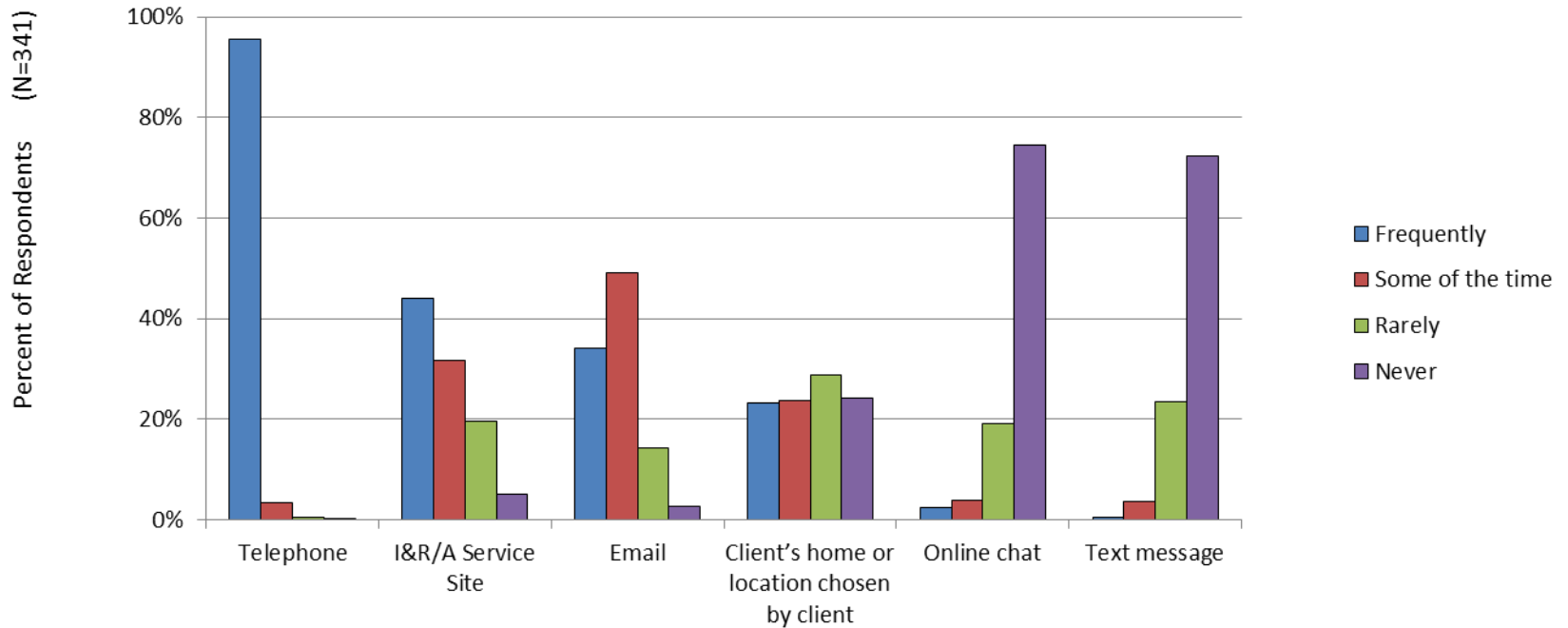
Research Database Sharing: With which other entities does your organization shares its resource database?
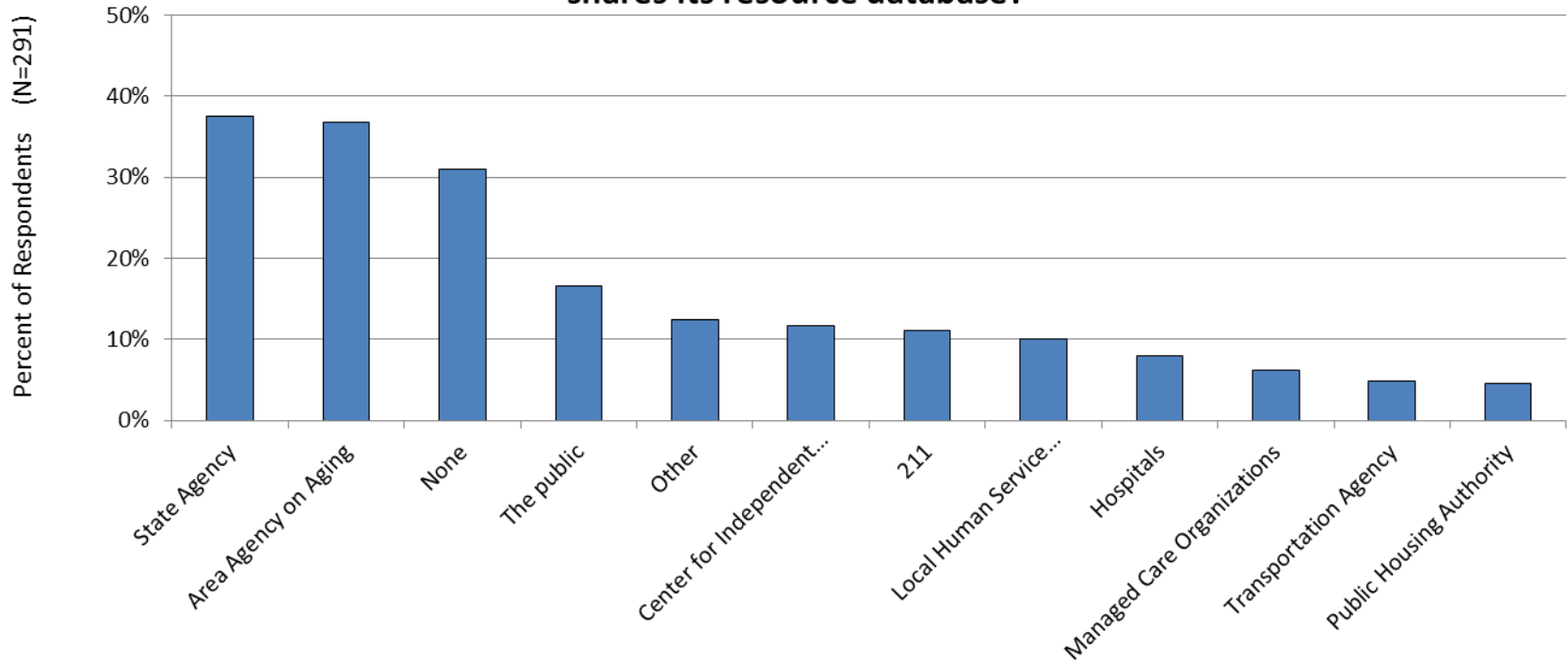
2015 Survey Highlights:
Data entry into multiple systems

How many information systems do I&R/A staff at your agency have to input data in?

- Other, 5.7%
- Three or more, 17.9%
- One, 46.8%
- Two, 29.6%

Percent of Respondents
(N=301)

2015 Survey Highlights: Consumer-friendly access to database

When asked to describe practices for providing consumer-friendly access to their agency's resource database, most respondents noted providing access via the agency website. Other and related practices included:

- Website links to an electronic copy of the resource database

- Website has a link to "find services"

- Resource database available on the website in the form of an assessment to narrow resource searches based on consumer needs

- Access to the database is available online and through printed resource directories

- Outreach and marketing (e.g., a brochure on the resource database)

- A public portal for consumers to access information on services and supports for older adults and individuals with disabilities

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The National Council on Independent Living
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