

**ADRC ADVISORY COMMITTEE MEETING
WEDNESDAY, October 12, 2016 -- 2:30 P.M.**



**ROCK COUNTY JOB CENTER
1900 CENTER AVENUE
ROOM D/E
JANESVILLE, WI 53546**

AGENDA

1. Call to Order and Welcome Chairperson Terry Thomas
2. Approval of Agenda
3. Approval of Minutes from the July 13, 2016 meeting.
3. Citizen Participation
4. Old Business
 - A. Family Care
 - a. Rollover numbers
 - b. New enrollments/Attrition slots
 - B. Staffing changes
5. New Business
 - A. Election of a new Vice-Chairperson
 - B. Transition Services
 - C. Satisfaction Survey Results*
6. Statistical Information *
7. Committee Member Comments
8. Next Meeting Dates:
2017 committee meeting dates to be determined, for January, April, July and October.
9. Adjourn

* Denotes Attachment

Committee Members unable to attend, please contact Jennifer Thompson (Rock County ADRC/LTS) at 741-3684.

Customer Satisfaction Report

for the Aging and Disability Resource Center
of Rock County



This report was prepared by Analytic Insight
for the Wisconsin Department of Health Services

August 2016



ACKNOWLEDGEMENTS

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This report was made possible by the Aging and Disability Resource Center directors, staff and customers who took the time to answer questions and provide information about their background, perceptions and experience. Customers answered many detailed questions and contributed their opinions, experiences and information to make the survey and focus group possible.

The authors would like to thank both staff and customers of the Wisconsin Aging and Disability Resource Centers for their participation in this study.

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EXECUTIVE SUMMARY

This report presents the 2015 results for the Rock County ADRC. The purpose of the report is to summarize the ADRC's service strengths, opportunities for improvement and overall customer satisfaction ratings. The ADRC can make strategic decisions using an evidence-based approach to developing strategies that improve ADRC services and customer satisfaction.

HIGHLIGHTS OF THE RESULTS

- ✓ The vast majority of Rock County ADRC customers say they will recommend the services of the ADRC, and they do. Over 90% of customers (93.8%) said they would recommend the ADRC's services, and over half of new customers surveyed said that they came to the ADRC because of a recommendation or word of mouth.

COMPARISONS TO STATEWIDE RESULTS

- ✓ Rock County ADRC customers consistently rated the ADRC near the statewide average.
- ✓ The Rock County ADRC was comparable to the statewide average for home visits in 2015 (42.7% vs. 44.5%).
- ✓ Almost half (46.9%) of customers reported receiving a follow-up to see how they were doing. This is below the statewide average of 64.7%.
- ✓ Customers rated their overall experience at Rock County ADRC and the usefulness of their interaction very favorably, with each more than halfway between good and excellent. Each was comparable to the statewide average.

METHODOLOGY

This report is based on a telephone survey of 102 Rock County ADRC customers who participated in a statewide survey of 4,453 ADRC customers. Customers received information and assistance (I&A), options counseling or enrollment services. Interviewing began June 23 and continued through June 30 of 2015.

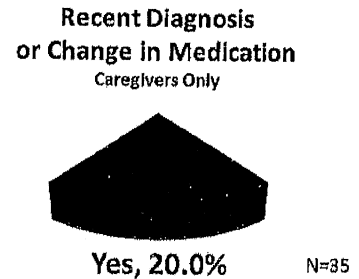
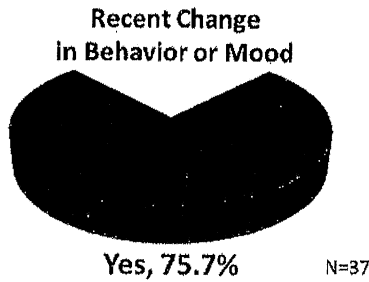
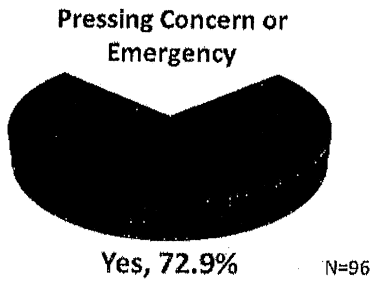
Sample Description	Size
Statewide 2015 survey	4,453
Rock County ADRC 2015	102

The survey contained several skip patterns. For example, only those respondents who received a home visit were asked questions specific to the home visit. In addition, some respondents opted out of particular questions. Results are reported only for groups of 5 or more respondents and small sample sizes are noted when applicable.

FIRST VISIT

This section describes how customers come to visit the Rock County ADRC. These results are compared to other Wisconsin ADRCs in the charts below and may be useful in interpreting your own results, understanding your new customers or identifying target areas for marketing your ADRC.

- ✓ Almost three out of four Rock County ADRC customers had a pressing concern or emergency when they visited the ADRC.
- ✓ Word of mouth is the most common way that customers learn about the Rock County ADRC.
- ✓ A higher than average percentage of Rock County ADRC customers came to the ADRC for help staying in their home.



FIRST HEARD OF THE ADRC THROUGH

** Could request that healthcare agencies to put link to ADRC on their website*

	Rock	Statewide
Recommendation/Word of mouth	54.5%	55.8%
Healthcare professional	16.8%	10.8%
Referral from an agency	7.9%	12.7%
Nursing home/Assisted living	6.9%	3.8%
Internet	3.0%	3.4%
Newspaper, TV or other media	3.0%	4.1%
Phone book	3.0%	0.9%
Brochure/Flyer	2.0%	4.1%
Through work	1.0%	2.8%
Sample Size	102	4446

PERSON WHO CONTACTED THE ADRC

	Rock	Statewide
Self	52.9%	55.9%
Parent	22.5%	19.4%
Spouse	6.9%	7.2%
Other relative	6.9%	7.9%
Child	6.9%	5.5%
Friend	2.9%	1.8%
Neighbor	1.0%	0.4%
Sample Size	102	4438

MAIN ISSUE OF CONCERN

	Rock	Statewide
Help staying in home	34.7%	22.5%
Dementia or Alzheimer's	14.9%	8.3%
Financial Assistance	12.9%	18.2%
Insurance Issues - Medicaid, Family Care, IRIS	10.9%	16.8%
LTC enrollment	7.9%	12.2%
Medical Issues	6.9%	5.5%
Transportation	5.0%	5.8%
Housing issues	5.0%	2.8%
Sample Size	102	4428

SOURCES OF INFORMATION

	Rock	Statewide
No other source of information	68.0%	73.3%
Internet	16.0%	11.5%
Advice of friends or family	6.7%	4.7%
Doctor or healthcare provider	5.3%	4.4%
Other	4.0%	5.1%
Sample Size	75	3669

PRIVACY CONCERNS

Just one percent of Rock customers expressed concerns about the privacy of their conversations with the ADRC.

TIMING OF THE VISIT

The majority of customers said they came to the ADRC at about the right time.

	Rock	Statewide
Came at about the right time	66.3%	69.3%
Wish they'd come sooner	32.6%	30.2%
Sample Size	89	4295

EASE OF GETTING IN TOUCH

On a scale of one to four, where one is poor and four is excellent, customers rated the ADRC of Rock County halfway between "good" and "excellent." These ratings are favorable and comparable to the statewide ADRC results.

	Rock	Statewide
Ease of finding the phone number	3.4	3.5
Returning calls promptly	3.5	3.5
Hours someone is available	3.4	3.5
Sample Size	109	4453

THE CUSTOMER EXPERIENCE

- ✓ The Rock County ADRC staff ratings are close to or slightly higher than statewide averages on many measures.
- ✓ Each item was rated close to excellent (3.7 to 3.9) on a scale of one to four, with four being "excellent."

CUSTOMER RATINGS OF ELEMENTS OF THEIR ADRC EXPERIENCE

	Rock	Statewide
Was knowledgeable about a range of services	3.9	3.8
Explained each step clearly	3.8	3.8
Helped me consider the pros and cons	3.8	3.7
Helped with the paperwork if needed	3.8	3.8
Helped me understand the cost of different alternatives	3.8	3.8
Got a good sense of what I could afford	3.8	3.8
Understood my needs and preferences	3.8	3.8
Made it easier to get needed information	3.8	3.8
Helped me use resources wisely	3.8	3.8
Help me navigate the system	3.7	3.7
Helped me follow through on my decisions	3.7	3.7

Sample Size

95

4295

IMPORTANCE OF THE OBJECTIVITY OF THE ADRC

The vast majority of customers think it is very important that the ADRC has no financial interest in their decisions, never charges for services and lets customers return if they need additional information or change their mind about the services they need.

They have no financial interest in your decisions.



Very Important, 78.9% N=90

They never charge for their services.



Very Important, 93.5% N=92

You can go back if you change your mind or need more information.

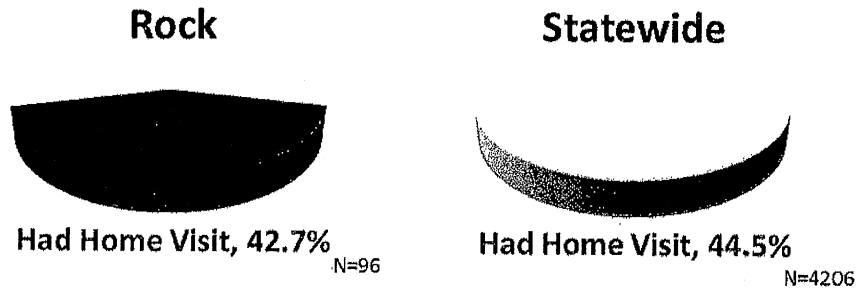


Very Important, 92.3% N=91

HOME VISITS

The Rock County ADRC was comparable to the statewide average for home visits.

Percent receiving "Home Visit":	Rock	Statewide
2015	42.7%	44.5%



LENGTH OF TIME TO HOME VISIT

The Rock County ADRC conducted a higher than average percentage of home visits within one week or less.

	Rock	Statewide
Less than 3 days	50.0%	45.7%
One week	38.2%	34.4%
More than one week	11.8%	19.9%
Sample Size	34	1676

SATISFACTION WITH THE HOME VISIT

Satisfaction with home visits is very high.

	Rock	Statewide
Average Satisfaction	3.8	3.8
Sample Size	41	1836

REFERRALS

This section presents results related to referrals made through the ADRC and their outcomes. In addition to the information below, less than a third (26.9%) of customers received a referral compared with 40.1% statewide in 2015. Note that this section refers to just those customers who received a referral to a resource external to the ADRC. The small sample sizes requires caution in interpreting these results.

CUSTOMER REFERRALS TO RESOURCES

	Rock	Statewide
Long-term care facility, nursing home or assisted living	13.0%	11.7%
Transportation	13.0%	5.2%
Legal services	13.0%	2.4%
In-home services	8.7%	7.9%
Medicaid, Medicare	8.7%	8.6%
Disability services	4.3%	9.9%
Family Care, IRIS	4.3%	20.3%
Employment or vocational rehabilitation	4.3%	1.8%
In-home health services	4.3%	3.6%
Social Security	4.3%	1.8%
County Services	4.3%	6.0%
VA	4.3%	1.1%
Sample Size	23	1643

RESULTS OF CUSTOMER REFERRALS TO RESOURCES

	Rock	Statewide
Received services	66.7%	69.6%
Too soon to tell	14.3%	15.3%
Not eligible	9.5%	3.9%
Services not what was wanted/needed	4.8%	4.1%
Too expensive	4.8%	0.4%
Sample Size	21	1643

FOLLOW-UPS

Following up, calling a customer after they have received the needed information to check on any additional needs or barriers they may have encountered, has been shown in previous research to have a strong impact on customer satisfaction and the usefulness of the ADRC experience.

- ✓ Approximately half of Rock ADRC customers reported receiving a follow-up to see how they were doing. This is somewhat less than the statewide average.
- ✓ Among those customers who did not receive a follow-up (not shown), 37% said they would have liked one.

Rock



Had Follow-Up, 46.9%

N=81

Statewide



Had Follow-Up, 64.7%

N=3887

CUSTOMER SATISFACTION DOMAINS

In the 2008 and 2010 customer satisfaction surveys, a set of domains were developed to provide a nuanced understanding of the elements that comprise customer satisfaction. Through statistical analysis, these domains emerged as distinct qualities of the ADRC that are significant predictors, or key drivers, of all aspects of customer satisfaction.

Domain scores are assessed by taking an average of all items that contribute to the domain. Like the items that comprise them, domain scores are measured on a scale of one to four. Customers were asked if each item was excellent (4), good (3), fair (2) or poor (1) or, in the case of statements, if they strongly agreed (4), somewhat agreed (3), somewhat disagreed (2) or strongly disagreed (1). Responses of "don't know" were removed from the analysis.

Domain	Meaning	2015 Indicators
Personalization	Consideration for the customer's and their family's individual needs and circumstances, following up to see how they were doing.	The person I worked with understood my needs and preferences. Got a good sense of what I could afford.
Accessibility	Convenience of location, hours, responsiveness and privacy when talking to staff.	Ease of finding the phone number. Returning calls promptly. Hours someone is available.
Culture of Hospitality	Responsiveness and courtesy of staff.	Waiting time in office. Comfort of the waiting room environment. Privacy of conversation.
Knowledge	Offering knowledge about a wide range of services and easy access to information.	Was knowledgeable about a range of services. <Did not> overwhelm me with too much information Made it easier to get the information I needed.
Guidance	Explaining each step clearly, helping to navigate the system and fill out paperwork.	Helped me consider the pros and cons. Explained each step clearly. Helped with the paperwork if needed. Helped navigate the system.
Empowerment	Helping the customer to explore their choices, weigh the pros and cons, and connect to needed services.	Let me know what to expect next (yes/no) Helped me follow through on decisions. Helped me consider future needs. Helped me understand the cost of different alternatives. Helped me use my resources wisely.

DOMAIN RATINGS

- ✓ The Rock County ADRC's domain ratings are at or slightly below the statewide average in each of the domains.
- ✓ The largest gap between Rock County and the statewide results are in Guidance (.2 difference).

Personalization	2.9	3.0
Accessibility	3.4	3.5
Culture of Hospitality	2.9	3.0
Knowledge	3.5	3.6
Guidance	3.6	3.8
Empowerment	3.4	3.5

ENROLLMENT COUNSELING INTO PUBLICLY FUNDED LONG TERM CARE PROGRAMS

- ✓ Approximately one out of four Rock County ADRC customers (26.4%) talked to the ADRC about Medicaid program choices. Among those who talked with the ADRC about this issue, 40% pursued Medicaid as a way to help pay for services.
- ✓ Among those who did enroll in a Medicaid program, the majority (66.7%) said that the ADRC prepared them for the documents that would be needed.
- ✓ The small sample size for Rock County ADRC customers in this subgroup requires caution in interpreting these results.

	Rock	Statewide
Spoke with ADRC about LTC programs	26.4%	32.1%
Sample Size	91	4056
Received help paying for services	40.0%	53.2%
Sample Size	20	1156
Prepared customer for needed documents in advance	66.7%	71.7%
Sample Size	6	480

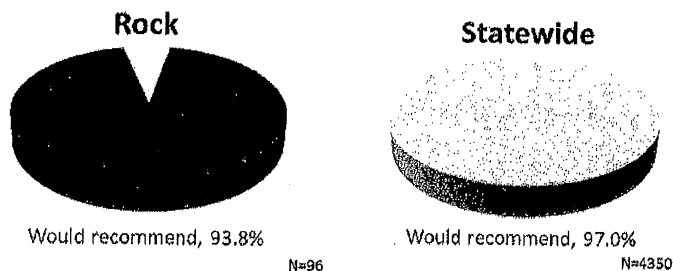
CUSTOMER SATISFACTION OUTCOMES

- ✓ Customers rated their overall experience at the Rock County ADRC favorably at 3.5. This is slightly below the statewide average.
- ✓ The usefulness of the information received was also rated favorably at 3.7. This is comparable to the statewide average.

	Rock	Statewide
Overall experience	3.5	3.6
Usefulness	3.7	3.7
Sample Size	102	4340

OTHER OUTCOMES

A very high percentage of customers said that they would recommend the services of the ADRC.

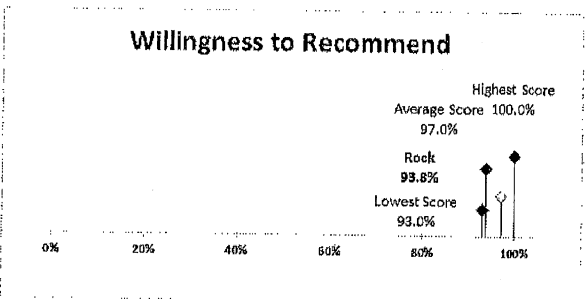
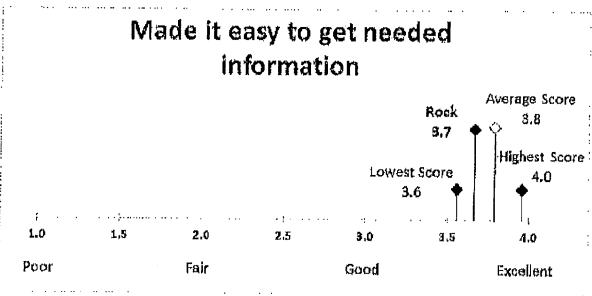
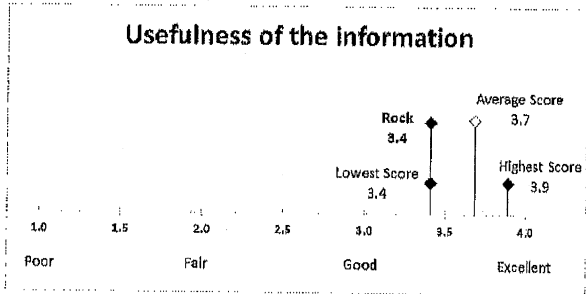
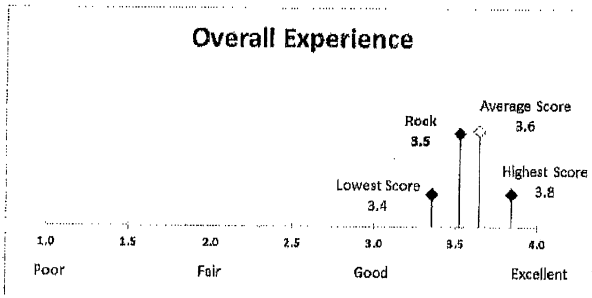


One in three Rock County ADRC customers (32.8%) said that their experience with the ADRC helped them prevent or delay going into a nursing home.

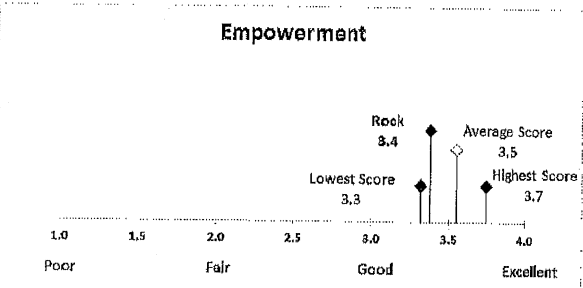
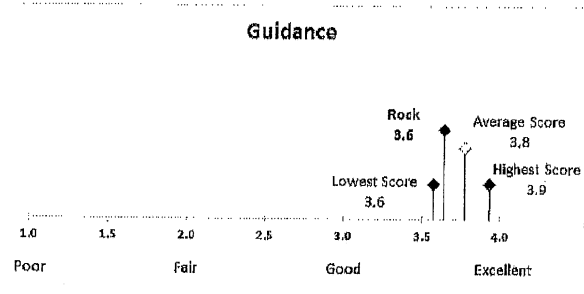
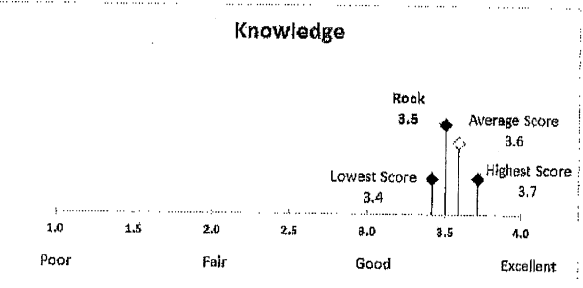
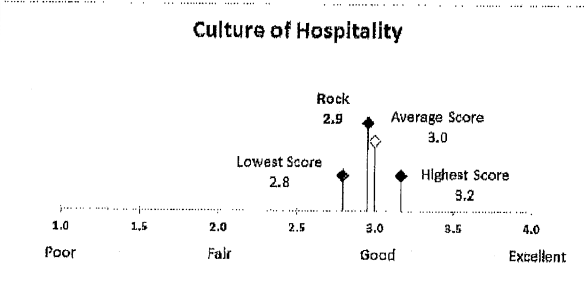
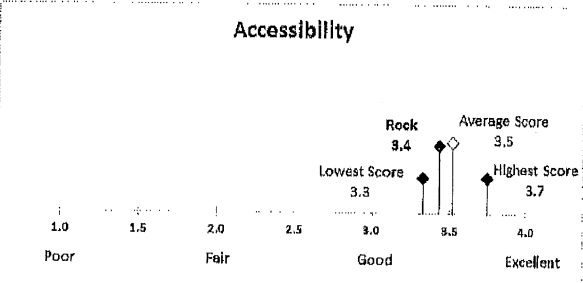
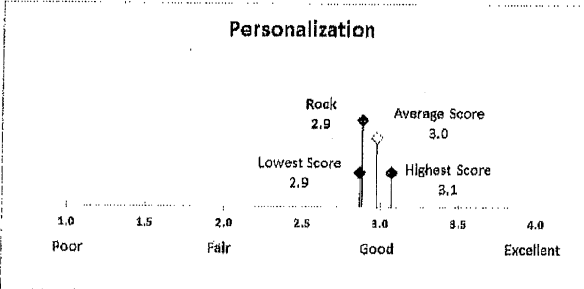
	Rock	Statewide
Noticed an unrecognized need or concern	31.6%	33.7%
Helped avoid or delay nursing home care	32.8%	29.6%
Helped prevent a fall or an accident	71.9%	66.7%
Learned about safety issues	49.3%	53.6%
Was not overwhelmed by too much information	83.7%	82.8%
Sample Size	98	4344

COMPARISONS TO AVERAGE, LOWEST AND HIGHEST SCORES

The following charts show the Rock County ADRC relative to the lowest, highest and average scores for ADRCs statewide. Shown on this page are outcomes for overall experience, usefulness, willingness to recommend and ease of obtaining information.



The following charts show the domain averages for Rock relative to the lowest, highest and average scores for other ADRCs statewide. Shown on this page are the domains of Personalization, Accessibility, Culture of Hospitality, Knowledge, Guidance and Empowerment.



INFLUENCES ON CUSTOMER SERVICE OUTCOMES

The following table shows Rock County ADRC results for questions that are strong predictors of customer service outcomes. The Gap Analysis shown in the table provides an indicator of how far above or below the statewide average Rock County ADRC was rated. A negative "gap" means that your ADRC is below average, and a positive gap that you are above average.

Helping customers understand the cost of different alternatives, consider future needs and navigate the system are each key drivers of customers' ratings of both their overall experience and usefulness of the information they received. Improvements in these areas are likely to have a strong impact on the customer experience overall and the usefulness of the information received.

Letting customers know what to expect next is strongly associated with customers' perception of the usefulness of their experience and is rated below the statewide average.

ADRC PROCESSES AND CHARACTERISTICS ASSOCIATED WITH SELECTED ASPECTS OF CUSTOMER SERVICE

Customer Service Aspect	Predictors	Rock County ADRC	Statewide	Gap
Overall Experience	Helped me consider my future needs	3.3	3.5	-0.2
	Help me navigate the system	3.6	3.75	-0.2
	Helped me understand the cost of different alternatives	3.5	3.76	-0.2
	Helped me consider the pros and cons	3.4	3.75	-0.1
	Helped with the paperwork if needed	3.7	3.82	-0.1
Usefulness	Helped me consider my future needs	3.3	3.5	-0.2
	Helped me understand the cost of different alternatives	3.5	3.8	-0.2
	Help me navigate the system	3.6	3.8	-0.2
	Let me know what to expect next (percent yes)	68%	79%	-11%

RECOMMENDATIONS

Based on the customer survey results, the Rock County ADRC may wish to capitalize on the following strengths while addressing several opportunities to improve the customer experience. When reviewing these recommendations, it is important to note that:

- ✓ Customers’ ratings of their overall experience at the Rock County ADRC is slightly below average, at the halfway point between good and excellent (3.5).
- ✓ The percentage of Rock County ADRC customers receiving home visits is comparable to the statewide average. The majority of the home visits were made within a week or less.

CURRENT STRENGTHS

- ✓ Rock customers rated the usefulness of their experience very favorably at 3.7, close to “excellent.”
- ✓ The word cloud below shows the Rock County ADRC customers’ comments at the end of the survey in response to the interviewer asking if they would like to add a comment in their own words about their experience with the ADRC.
- ✓ Comments focused on the help received and the staff. One respondent commented “The staff was a huge help. They need to be recognized as excellent and caring people.”



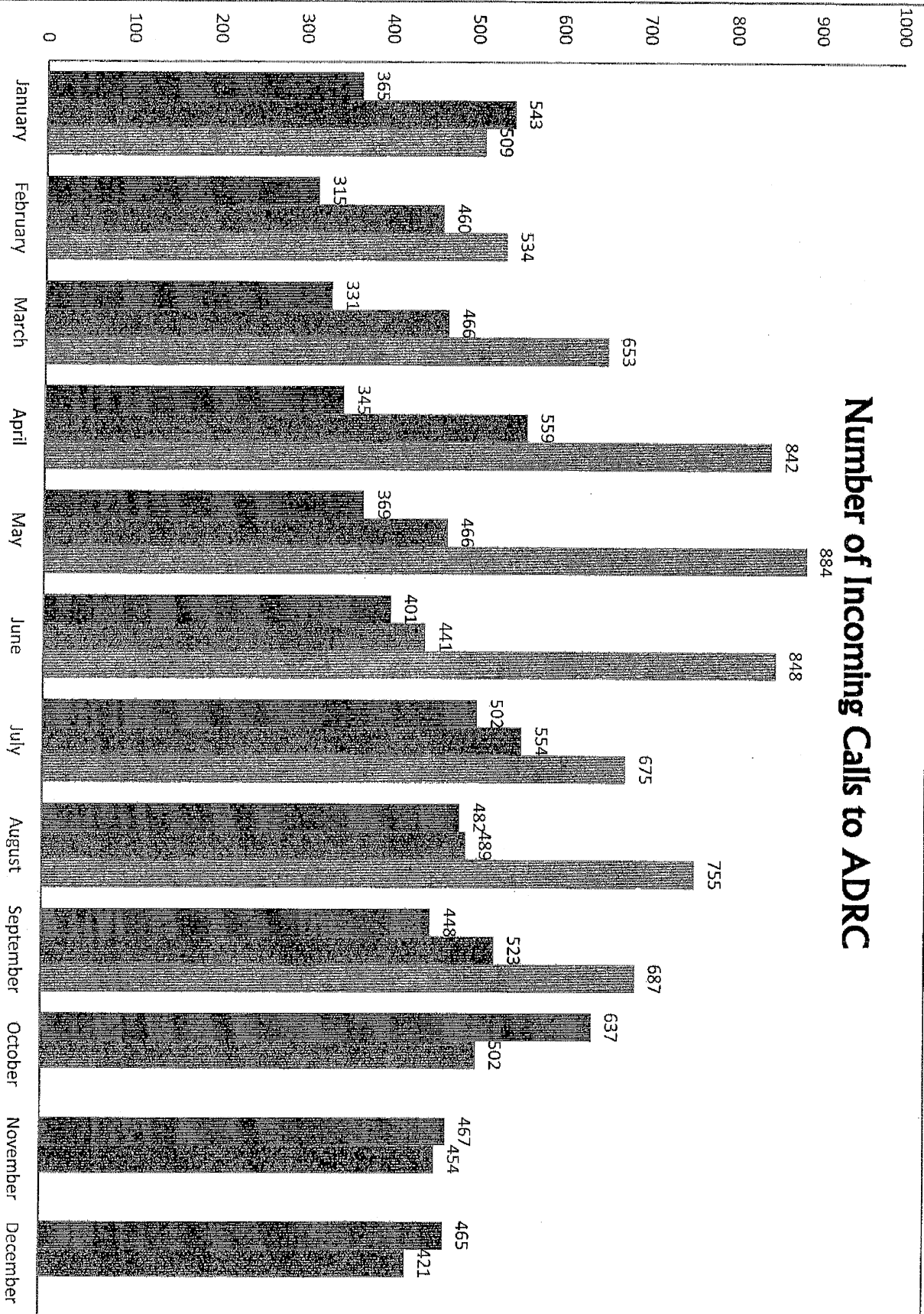
NEW OPPORTUNITIES

- ✓ **Targeting Follow-Ups.** Less than fifty percent of customers received a follow-up, somewhat below the statewide average. Among those customers who did not receive a follow-up, 37% said they would like one. By continuing to refine the understanding of when a follow-up is desired and providing follow-up to all customers who are open to the contact may help the Rock County ADRC to continue to improve its excellent level of customer service.
- ✓ **Increasing Referral Utility.** Almost twenty percent of Rock County ADRC customers who received a referral said that they were not eligible, the referral was not what was needed or the service was too expensive. The utility of referrals could be improved by better understanding the customers’ needs

before making a referral and by following up to identify those who have encountered a barrier to following through or who have found that the referral is not what was needed.

- ✓ **Reaching New ADRC Customers.** Almost one in three Rock County ADRC customers (32.6%) say that they wish they had come to the ADRC sooner. Expanded outreach efforts may reach new customers and inform the public that they can seek information for themselves or a loved one.
- ✓ **Clarifying Customer Expectations.** Approximately one out of three customers in Rock County felt they did not have enough information as to what to expect next which is above the statewide average by 10%. In addition, a lower than average percentage said that the ADRC let them know what to expect next. By clarifying the process and helping customers understand their next steps, the ADRC may improve customer satisfaction overall.

Number of Incoming Calls to ADRC



■ 2014 ■ 2015 ■ 2016

SAMS Agency Call Report

10/3/2016

- 3rd Quarter 2016

Who made contact (Caller Type):

No. of Calls	Caller Type
1,116	(Self)
510	11-Legal Decision Maker
51	12-Caregiver
704	13-Relative/Friend/Neighbor/Comm Mbr
707	14-Agency/Service Provider
906	15-ADRC Contacted Consumer/Designee
424	16-ADRC Initiated Collateral Contact
231	99-Other
4649	Total

Topic Categories discussed during call:

No. of Calls	Topic Category
194	Abuse and Neglect
44	Adaptive Equipment
22	ADRC Printed Material
99	Alzheimer's and Other Dementia
1	Ancillary Services
5	Animals
214	Assisted Living (AFH, CBRF, RCAC)
7	Budget Assistance
78	Caregiving
7	Community I&R
17	Complaints (other)
6	Education
2	Emergency Preparedness
41	Employment
7	End of Life
45	Food
71	Health
1	Health Promotion
434	Home Services
271	Housing
21	Income Maintenance
77	Insurance
81	Legal Services
8	MDS Section Q Referrals
10	Medical Home Care

SAMS Agency Call Report

10/3/2016

- 3rd Quarter 2016

43	Mental Health
179	Nursing Home
204	Other
2,966	Public Benefits LTC Programs
580	Public Benefits, Other
12	Recreation/Socialization
25	Referral for Financial-Related Needs
24	Referral for Private Pay Options
8	Taxes
108	Transportation
1	Unmet Need – Dental
1	Unmet Need – Mental Health Services incl Case Mgmt
10	Unmet Need – Other
1	Unmet Need – Rent/Mortgage Assistance
5	Unmet Need – Utility Assistance
22	Veterans
2	Volunteer Opportunities
15	Youth in Transition
4541	Total

ADRC Activity:

No. of Calls	ADRC Activity
826	Administrative (Select exclusively.)
327	Attempted Contact (Select exclusively.)
73	Community Partners (Select exclusively.)
16	Complaints/Advocacy
139	Long-Term Care Functional Screen
67	Provided Assistance with MA Application Process
5	Provided Brief or Short-Term Service Coordination
24	Provided Disenrollment Counseling
374	Provided Enrollment Counseling
134	Provided Follow-up
2,805	Provided Information & Assistance
64	Provided Options Counseling
7	Referral to ADRC
4649	Total

Consumer Age Group:

No. of Calls	Consumer Age Group

SAMS Agency Call Report

10/3/2016

- 3rd Quarter 2016

21	100 - 150
233	17 - 21
1,661	22 - 59
2,643	60 - 99
4558	Total

Referred By:

No. of Calls	Referred By
119	ADRC Presentation
1	Assisted Living
257	Called Before
1	Economic Support
13	Friend/Family
4	Home Health Agency
7	Hospital
16	Internal Referral
23	Internet
7	Nursing Home
27	Other Agency
1	Physician
20	Resource Directory
1	School
497	Total

Disability:

No. of Calls	Disability
1,133	01-Developmental/Intellectual Disability
2,182	02-Elderly: Age 60 or Older
396	03-Mental Health
1,117	04-Physical Disability
34	05-Substance Use
432	06-Unknown (Select exclusively.)
4575	Total

Monthly Total

No. of Calls	Total Minutes	Month
1,594	141,156	July, 2016
1,565	141,469	August, 2016
1,490	68,978	September, 2016
4649	351603	Total