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PROJECT OVERVIEW

Multnomah County Aging & Disability Services provides information and assistance to seniors, people with disabilities and veterans through a 24-hour helpline. The Helpline and nine District Center partners help simplify access to services and provides important follow-up and advocacy to ensure needs are met. Information & Assistance (I&A) Specialists help assess a caller’s needs, identify services to meet those needs and link them with providers of those services.

To evaluate our Information & Assistance system within Multnomah County, Elders in Action conducted a secret shopper project of our ten I&A sites. I&A scenarios that are commonly presented to I&A Specialists were created as templates for the volunteers to follow. Volunteer secret shoppers received training on how to make an I&A call and how to record their impression of the call. Call notes followed a similar format as was used in the six Portland State University Institute on Aging evaluations of I&A Services. I&A experts at Multnomah County Aging & Disability Services who are not evaluated in this study reviewed the call notes and measured the appropriateness of the referrals. A total of 110 Information & Assistance secret shopper calls were made February to July 2010. Because calls were taken by a variety of staff the broad term of I&A call handler will be used for this report. Results are aggregated by site.

Overall the Information & Assistance system in Multnomah County has some strengths and weaknesses but I&A services are not being delivered uniformly across sites. There are also excellent examples of best practices, but results vary widely based on the type of call handler. We have garnered some very valuable information about call logistics, call handler ability and the quality of referrals. We also learned a tremendous amount about this type of evaluation and would structure it slightly differently for future evaluations.

EXECUTIVE SUMMARY

Overall the results of this evaluation elucidate many findings about Multnomah County's ADS Information & Assistance (I&A) system, but keep in mind that the sample size is small (n=110) and many responses were affected by the training and acting ability of the volunteer secret shopper, the scenario that was presented to the I&A call handler, and the type of call handler that conducted the I&A call. Despite these evaluation shortfalls, the results show how complex our I&A system is from the perspective of callers. Some of the key findings from the 2010 Information & Assistance Secret Shopper study are listed below:

- Secret shoppers were given the published I&A telephone numbers to each of the ten sites, but many callers were routed to different offices such as branches or affiliate senior centers. Half of all calls (50%) placed to co-located District Center I&A lines never reached the DC but stayed at the branch level. Some of the results reflect interactions with branches rather than with the DC I&A Specialist; however normally callers would not know if they had the "right" contact person or office and would evaluate their call accordingly. The mis-routed calls demonstrated how our I&A system can be fractured and callers are served by people of varied I&A training.
- To measure the level of appropriate referrals made during the I&A Secret Shopper call, two I&A experts (not call handlers) at Multnomah County Aging & Disability Services rated each call on very appropriate to extremely inappropriate. The average for all calls was between appropriate and very appropriate; however results varied dramatically by type of operator.
- Receptionists who conducted the I&A calls scored significantly lower on the appropriateness of referral as compared to I&A Specialists, Case Managers or Supervisors. Callers were significantly less likely to say that receptionists gave them the information or advice they were looking for than the other call handlers. Receptionists scored worse than other call handlers on all measures of operator ability. Receptionists were rated as "good" while all other call handlers were rated as "very good" or "excellent" on average. 26% of all I&A calls were conducted by Receptionists.
- At non co-located District Centers, one third (34%) of all calls were never transferred and receptionists conducted the I&A call. Of all calls conducted in this evaluation, only 61% were handled by an I&A Operator, Case Manager or Supervisor.
- Call handlers explained things in a way the caller could understand 93% of the time.
- The majority of callers felt that the call handler understand what they were calling about – 63% said "yes, definitely" and 31% said "yes, I think so" in response to "Did the call handler understand what you wanted?"
- The sample size of Central Helpline calls is small (n=10), but there were no significant differences between District Center responses and Central Helpline responses for any variable related to I&A call handler ability, number of referrals, number of questions asked, or the ranking of the appropriateness of the referrals made.
- There were no highly significant differences between co-located and non co-located District Center sites for any of our major measures. The only slightly significant difference (p=.054) was that non co-located sites were more likely to not provide any referrals to callers.
- 94.5% of calls were answered in less than 5 rings and most calls were answered by a person (83.6%) as compared to being answered by voicemail or an auto attendant (16.4%). In 2008 based on an I&A evaluation from PSU, 90% of calls were answered in less than 5 rings.

- Most callers did receive a referral to another program or resource (89%), however almost half of the callers only received one referral (46%). The appropriate response to some of the scenarios would have been only one referral so this measure becomes complicated, as explained on page 7.
- As callers were sent from one person or office to another, warm transfer technology would greatly improve customer service.
- Callers said call handlers did not listen carefully to what they wanted 7% of the time.
- Half of the time (52%) callers reported “Yes, Definitely” to whether or not they received the information/advice they were looking for by the I&A call handler.
- 40% of all calls were rated as excellent for overall call handling. 14% of calls were rated as fair, and 8% were rated as poor.

INFORMATION & ASSISTANCE SITE DESCRIPTIONS

The nine District Centers and the central Helpline were included in the Information & Assistance review. Branch offices were excluded for this portion of the project, although we hope to include these sites in future evaluations. Information and Assistance (I&A) calls are handled by receptionists, case managers, supervisors as well as dedicated I&A staff. The ten Information & Assistance sites included in this evaluation are:

- Central - Helpline at Multnomah County Aging & Disability Services
- North- Impact Northwest District Senior Center Services
- Northeast – Hollywood District Senior Center Services, Urban League District Senior Center Services
- Northwest – Friendly House District Senior Center Services
- Southwest – Neighborhood House District Senior Center Services
- Downtown – Neighborhood House/Downtown District
- Southeast – Impact Northwest District Senior Center Services
- Mid-county – IRCO District Senior Center Services
- East - East YWCA District Senior Center Services

Some of the District Centers are co-located with Aging & Disability Services Medicaid branch office. Our co-located sites are Impact Northwest District Senior Center Services, IRCO District Senior Center Services and East YWCA District Senior Center Services.

INFORMATION & ASSISTANCE SECRET SHOPPER CALLS

Elders in Action recruited 13 volunteers to place calls to Multnomah County's Aging & Disability Services Information & Assistance sites. A total of 110 calls were conducted. Calls were made from February 2, 2010 to July 28, 2010 though 96 percent of the calls were done February through May.

The scenarios that volunteers used during their I&A calls were developed by Alliance of Information & Referral Systems certified staff and represented calls that are frequently received across Multnomah County's I&A system. Each I&A site was presented with each scenario, however the Downtown District Center was not appropriate for a scenario related to a neighbor with possible self-neglect as demonstrated by a private residence in disrepair with an overgrown yard. The other scenarios were concerning:

- insurance questions about caller's mother with Medicare who recently relocated
- concern for a caregiver sister looking after caller's mother with Alzheimer
- finding information on a website with resources for older adults
- interest in senior volunteer opportunities
- interest in finding senior employment
- concern for a neighbor who cannot afford her prescriptions
- confusion about a Medicare counseling program at a senior center
- need for home modifications to accommodate a scooter
- need for a food box
- seeking resources for caregiver friend

Most Information & Assistance sites had 11 secret shopper calls from Elders in Actions volunteers. IRCO Senior Center had 9 secret shopper calls while Hollywood had 13 because of how calls were assigned to volunteers.

CALL TRENDS AS REVIEWED BY I&A EXPERTS

Overall Observations

- Many call handlers did a great job telling the caller to call back if they had remaining questions and making themselves available for further questions.
- Callers who wanted volunteer opportunities were generally only referred to the District Center activities and needs. While it is understandable in this political climate to foster volunteer power at the local level, it is also recommended to provide callers with a range of choices.
- When presented with an I&A call about someone other than the caller (mother, sister, neighbor, etc.), many I&A call handlers wanted the person in need to call so that they could tailor a more appropriate response. This was viewed as an acceptable reply. In some cases, call handlers asked if the person in need would be comfortable calling for information and helped the caller game plan a strategy, while other call handlers did not.
- Private pay resources provided were limited and understandable as ADS has only very recently begun adding private pay resources into the Network of Care web-based directory.

Training Needs

- A training need was identified about how receptionists, or the first person to answer a call, can politely interrupt the caller in order to get them to the correct I&A person and avoid telling their story twice.
- Based on the secret shopper notes, there were at least two calls that were never returned by two District Centers which requires more training about call handling procedures and standards.
- Acronyms were confusing to callers – particularly around SHIBA (Senior Health Insurance Benefits Assistance Program) and OPI (Oregon Project Independence). Explaining programs and providing context to the resources could be expanded.
- The average number of clarifying questions asked by an I&A call handler was two. Six out of 11 scenarios presented to the I&A call handler should have had 3 or more referrals while the other five scenarios were appropriately referred with only one resource. Of the scenarios presented to I&A call handlers that required Alliance of Information and Referral Systems (AIRS) standards of three or more referrals, 42% of calls only received one referral. More training is needed to solicit the caller's needs so that the most appropriate referral is made.
- Call handlers that spoke quickly or softly were hard to understand for some callers.

Receptionist as I&A Specialists

- 26% of all I&A calls were conducted by Receptionists at District Centers or staff functioning in a reception capacity at Central Helpline. At non co-located District Centers, one third (34%) of all calls were never transferred and receptionists conducted the I&A call. It was noted that the receptionists should feel more comfortable in transferring the call or taking a message rather than proceed without the needed resources or information.
- Receptionists who conducted the I&A calls scored significantly lower on the appropriateness of referral as compared to I&A Specialists, Case Managers or Supervisors. Callers were significantly less likely to say that receptionists gave them the information or advice they were looking for than the other call handlers. Receptionists scored worse than other call handlers on all measures of operator ability. Receptionists were rated as “good” while all other call handlers were rated as “very good” or “excellent” on average.
- Callers said they didn't know who they were being transferred to by receptionists and the transitions were sometimes abrupt. Best practice would be to tell callers who they are being forwarded to and why.

CALL TRENDS AS REVIEWED BY I&A EXPERTS, Continued

Best Practices Related to Specific Calls

- An excellent example of a best practice came from **Friendly House** where an I&A call handler addressed the immediate need and helped problem solve more of the root causes of that need.
- Both **Neighborhood House Downtown** and **Friendly House** had call handlers that clearly defined next steps for the caller and told them how to prepare.
- **Impact Northwest SE** solicited good information from the caller, made an appropriate referral and outlined the process of how that person would be in contact.
- Impact Northwest **North District Center** caller said the service was “A+... above and beyond” and caller was impressed with the broadness of approach with screening.
- **Hollywood** Call handler did a great job explaining a program, spelling out the acronym, explaining the timing, next steps and providing context to the resource.
- Call notes from an I&A call handler at **IRCO** read “outstanding message was that [call handler] would be more than willing to help with the process...offered to talk and/or determine best avenue rather than [have me] make random calls.”
- I&A Specialist at **Urban League** clearly outlined steps for intake services and explained what type of documentation is needed.
- **Friendly House** staff explained that a case manager could do a house visit if the person in need was unable to come into the center. The caller said the customer service was excellent.
- **Central Helpline** staff asked good screening questions of an I&A caller that resulted on quality referrals for both short-term and long-term solutions related to food insecurity.

Causes for Concern Related to Specific Calls

- It appears a caller trying to reach the **East YWCA** reported that they were put on hold multiple times and one time for 10 minutes at the **East branch office** before being transferred to the East YWCA. They were again put on hold multiple times.
- Call handler at **IRCO** was noted as talking too fast to understand.
- Reception call handler at **Friendly House** said they didn't know the answer to caller's question and no one on site could assist. Call handler did not want to take message for other staff.
- **Hollywood** receptionist was noted as being “uncaring and unhelpful.”
- At **Urban League**, a caller received the national phone number for Medicare from the volunteer receptionists rather than any SHIBA information or explanation of the benefit, despite having an onsite SHIBA counseling appointments at the center.
- A **Hollywood** receptionist told a caller the resources sought were only available on the bulletin board at the Center and the caller would need to come into the District Center to get the information. No mention of Network of Care or additional resources
- At **North District Center** callers reported confusion with auto operator and with voice mail instructions.
- An **Urban League** receptionist provided referrals from her “resource book” rather than a current, shared resource like Network of Care. Three of the five numbers provided were disconnected because the information was very out of date.

CALL TRENDS AS REVIEWED BY I&A EXPERTS, Continued

System Changes

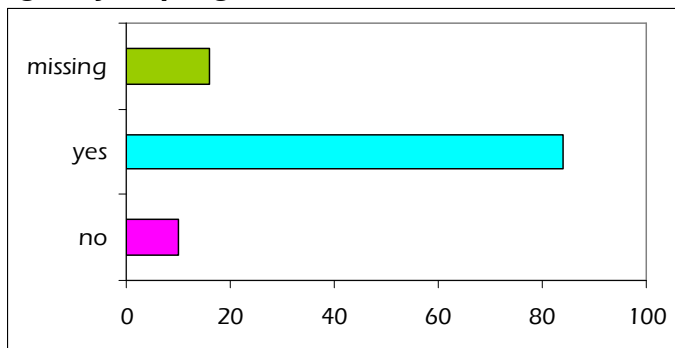
- Of all calls conducted in this evaluation, only 61% were handled by an I&A Operator, Case Manager or Supervisor. I&A Specialists asked more clarifying questions than any other call handler. Based on receptionist's call handling and appropriateness of referral scores for key measures in this evaluation, we should shift the focus for I&A calls to be handled only by skilled I&A staff and not receptionists.
- As noted earlier, half of all callers (50%) who contacted a co-located District Center never made it to the District Center, but remained at the branch. While these call evaluations do affect the District Center, it also demonstrates the confusion callers face when trying to get information from a layered service delivery system.
- While Branch offices were not specifically included in this study, 12% of all calls in this study were conducted at branches when callers contacted co-located sites and were not transferred to District Centers. Transfers to District Center I&A Call handlers should occur if the branch staff cannot sufficiently answer the caller's question or the call volume is high.
- There is a need for standards frequency and duration for putting callers on hold especially if call volume is high. One caller said they were put on hold five times and another said they had a 10 minute wait time.
- A greater ability for warm transfer technological capability and staff training is sorely needed.
- Central Helpline moved from a reception model to a call center model during the time of this evaluation and more data will need to be collected to see if there are any changes with the streamlined call handling system. 64% of evaluated calls occurred during the reception model.

REFERRALS TO AGENCIES/PROGRAM BY I&A CALL HANDLER: ALL SITES

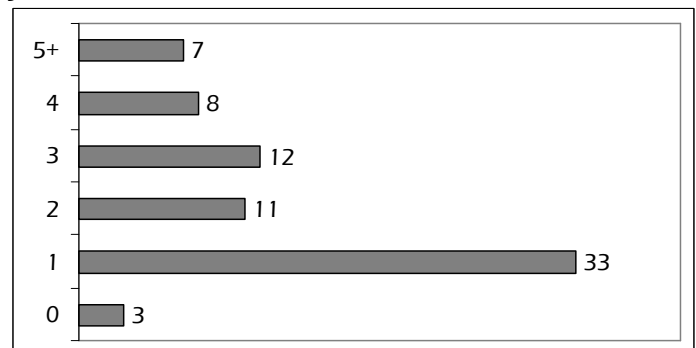
Elders in Actions volunteers provided details on the referrals the I&A Call handler made during their call. They recorded whether or not they were referred to an agency or program, the total number of referrals, and the referral source.

Most callers did receive a referral to another program or resource (89%), however almost half of the callers only received one referral (46%). Alliance of Information and Referral Systems (AIRS) standards for I&A calls specify a minimum of three referrals; however some scenarios presented to I&A call handlers were appropriate to have only one referral. For example, it was appropriate to direct callers inquiring about a resource website for seniors to Network of Care as it provides access to several resources. Similarly, Medicare questions are best addressed by trained SHIBA staff and volunteers and concerns about neglect were directed to adult protective services for additional screening. Of the scenarios needing only one referral, 33% of I&A call handlers gave more than one referral. Of the scenarios presented to I&A call handlers appropriate for AIRS standards of three or more referrals, 42% of calls only received one referral and 46% of calls received the recommended three or more referrals.

All Sites: Were you referred to another agency or program



All Sites: Number of Agencies or Programs you were referred to



APPROPRIATENESS OF REFERRALS TO AGENCIES/PROGRAMS

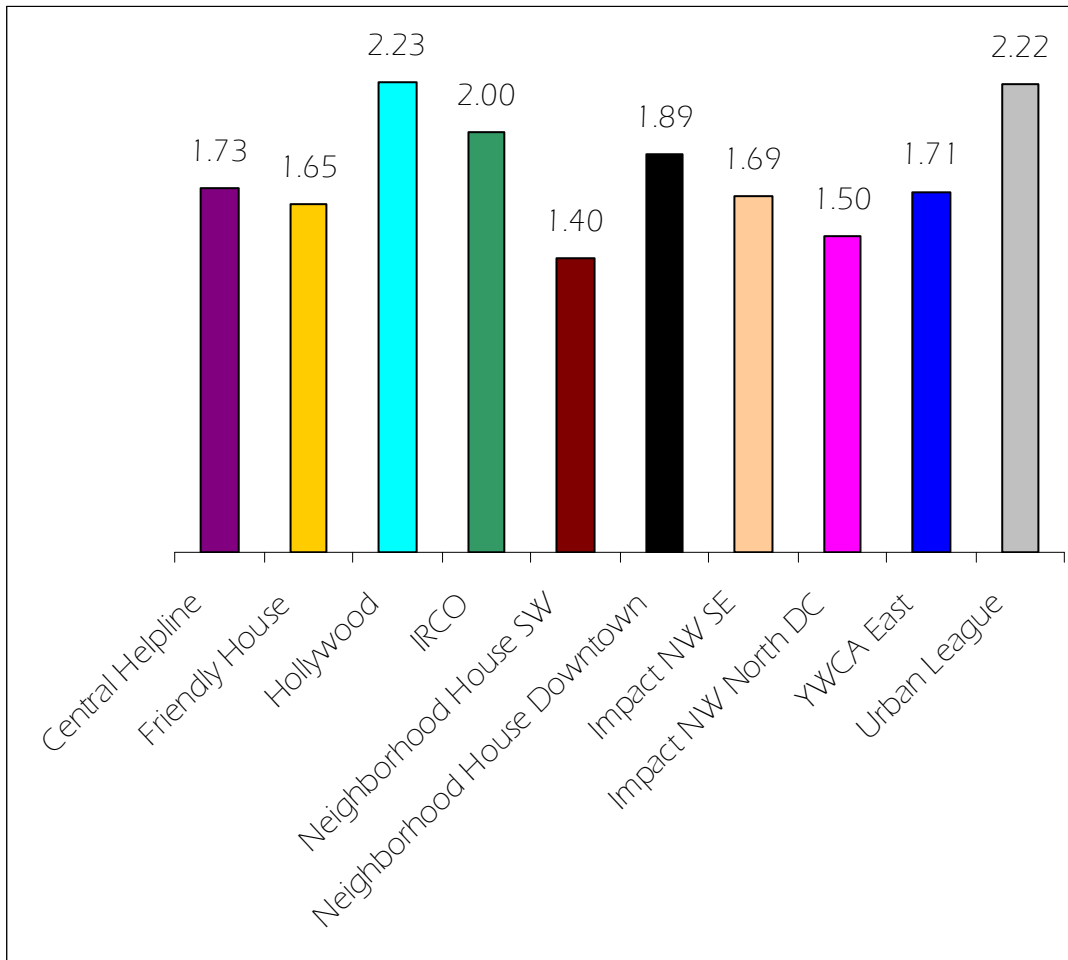
To measure the level of appropriate referrals made during the I&A Secret Shopper call, two Alliance of Information and Referral Systems (AIRS) Certified I&A experts at Multnomah County Aging & Disability Services who are not evaluated in this study rated each call on a 5-point scale from very appropriate to extremely inappropriate. The scale for measuring the appropriateness of the referral was:

- 1 very appropriate:** I&A call handler asked appropriate questions based on caller's needs and spent the time needed to respond to caller's concerns and/or explain next steps. Resources were targeted based on needs of caller. Additional help, advocacy, or follow up was offered if consumer was in doubt or needed further assistance
- 2 appropriate:** Referral(s) are appropriate for the caller's need. More time given to assess caller's needs or situation could have solicited additional resources or approaches.
- 3 neutral:** Some appropriate referral information was provided and either an incorrect or inappropriate referral was made or an essential referral was not provided
- 4 not appropriate:** Referral(s) given were not appropriate to the caller's needs or a more suitable resource should have been offered to caller. Essential referrals were omitted.
- 5 extremely inappropriate/missing referral:** Referral(s) would have directed the caller to a resource that would not have met their needs at all or no referrals of any type were provided. Extremely out-of-date referrals may also have been included.

All Sites: Average Score for Appropriateness of Referral

For all Information & Assistance sites, the average for appropriate referral score was 1.81, rating the referrals between appropriate and very appropriate. Lower scores are more favorable, 1 being a very appropriate and 5 being an extremely inappropriate referral as rated by two Alliance of Information and Referral Systems (AIRS) certified I&A experts who were not evaluated in this study. Scores for the two reviewers were averaged.

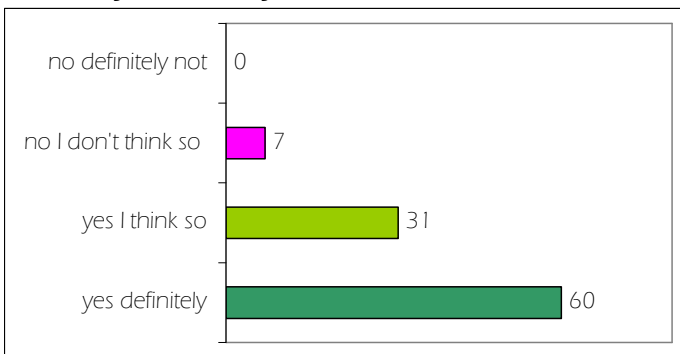
Of the 110 calls, 23 (21%) did not have an appropriate referral score due to lack of information. Individual site scores for appropriateness of referral ranged from 1.40 (best) to 2.23 (worst) as shown in the graph below.



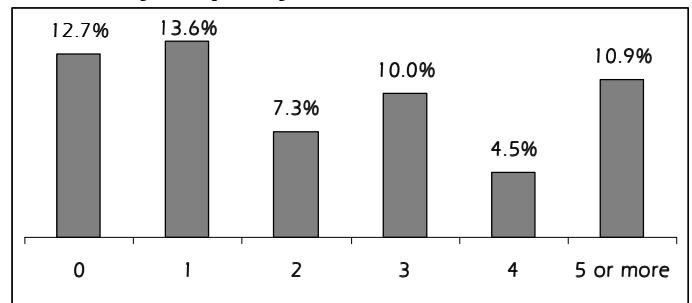
I&A CALL HANDLER ABILITY EVALUATION: ALL SITES COMBINED

- Callers said that call handlers definitely listened carefully to what they wanted 61% of the time.
- Half of the time (52%) callers reported “Yes, Definitely” to whether or not they received the information/advice they were looking for by the I&A call handler.
- 41% of all calls were rated as excellent for overall call handling
- The majority of callers felt that the call handler understand what they were calling about – 63% said “yes, definitely” and 31% said “yes, I think so” in response to “Did the operator understand what you wanted?”
- Callers reported that the I&A call handler explained things in a way they could understand 93% of the time (72% said “yes, definitely” and 21% said “yes, I think so.”)
- The number of clarifying questions asked by the I&A call handler varied. Most callers were asked one clarifying question.

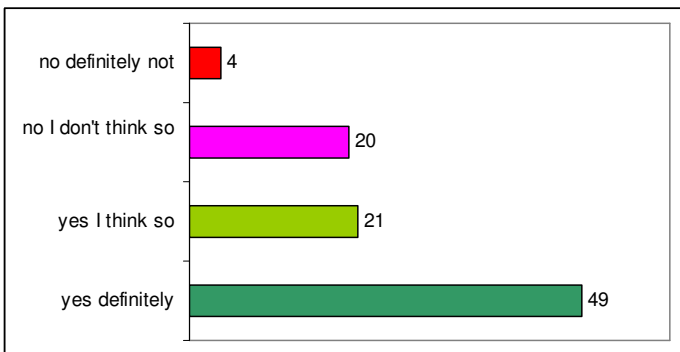
All Sites: I&A call handler listened carefully to what you wanted



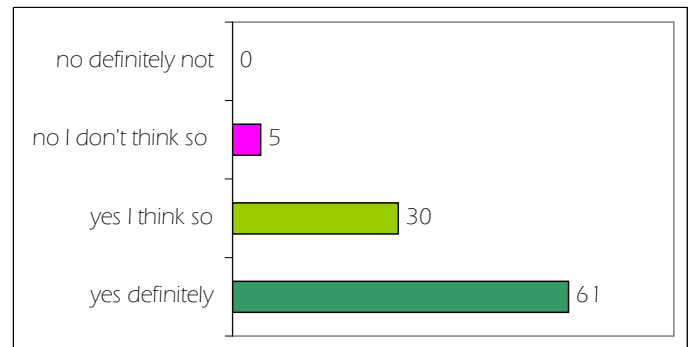
All Sites: Number of questions that were asked of you by the staff person who ultimately helped you?



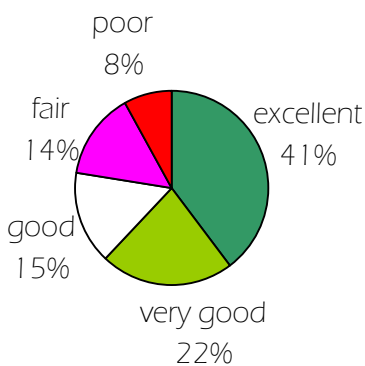
All Sites: caller received information/advice that they were looking for



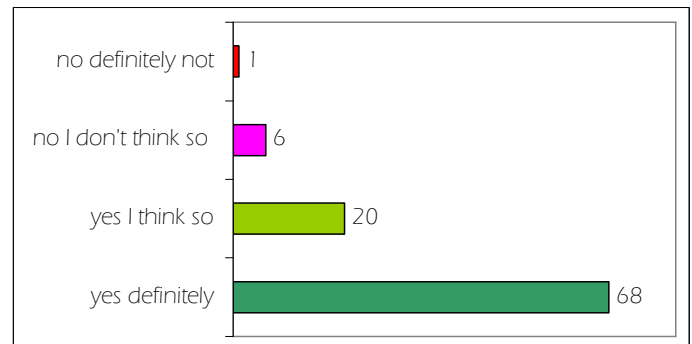
All Sites: I&A call handler understood what you wanted



All Sites: rate the way your call was handled



All Sites: I&A call handler explained in a way you could understand

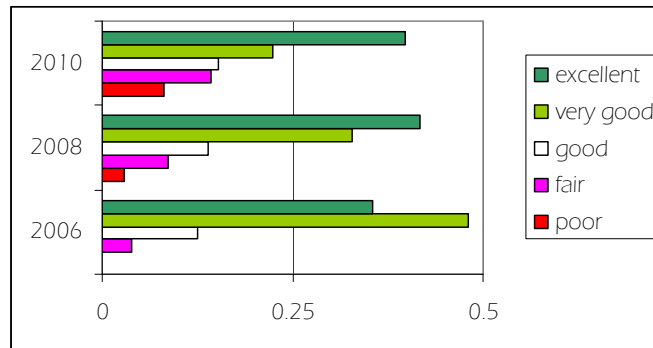


I&A CALL HANDLER ABILITY: COMPARISONS TO PREVIOUS I&A EVALUATIONS

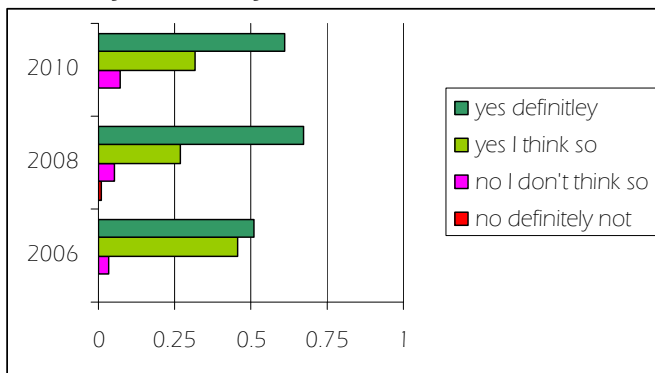
There have been 6 biennial evaluations of Multnomah County ADS Information & Assistance system from 1997 to 2008. Portland State University Institute on Aging conducted the evaluations in accordance with Administration on Aging's Performance Outcomes Measures Project. Randomly selected callers who had utilized Helpline or District Center Information & Assistance services participated in a telephone survey within seven days of their I&A interaction.

Many of the questions about I&A call handler's ability that were used in the PSU evaluations were replicated in this 2010 evaluation. The two types of evaluations were different in three important ways: real consumers rated operator ability in 2006 and 2008 and Elders in Action volunteers rated operators in 2010, scoring in 2010 was immediate and in 2006 and 2008 it was recalled from a conversation the week before, and the sample size was much greater in 2006 & 2008. Overall, 2010 results are quite comparable to 2008 results. Below are graphs that show the percentage of response by year.

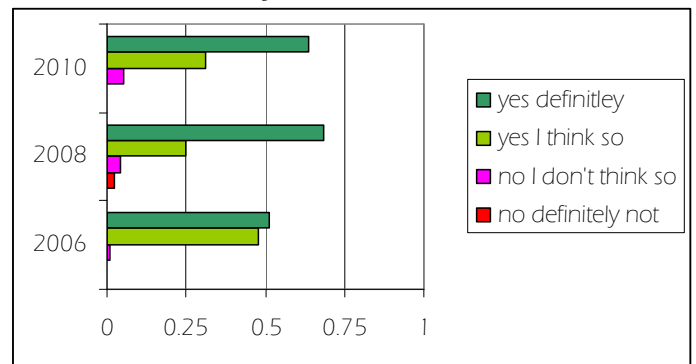
% of Response: Rate the way your call was handled



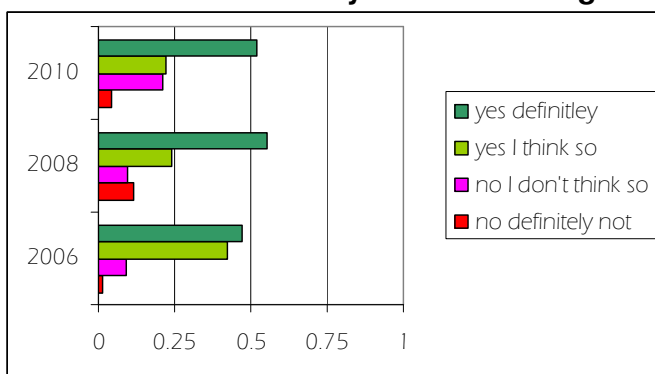
% of Response: Did the I&A call handler listen carefully to what you wanted?



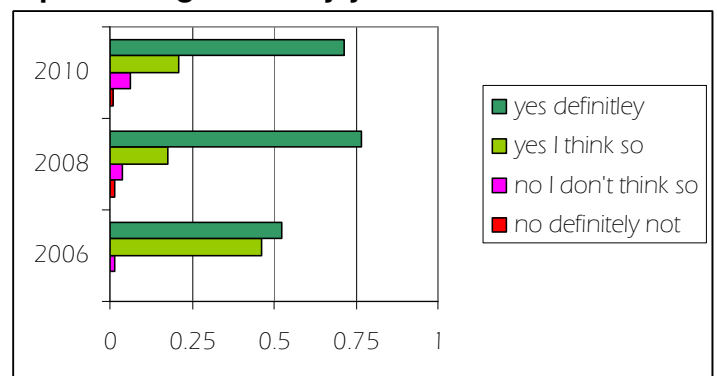
% of Response: Did the I&A call handler understand what you wanted?



% of Response: Did you receive the information/advice that you were looking for?



% of Response: Did the I&A call handler explain things in a way you could understand?



REVIEW OF SPECIFIC CALL SCENARIO & CALL HANDLER RESPONSE

One scenario presented to I&A sites was reviewed to see overall trends. The call below reviews situations a caller who said they were interested in volunteering in the District Center area and were looking for opportunities. The caller said they specifically were interested in helping seniors if asked. Overall, this call was handled poorly across sites. It appears that two District Centers never returned the call and one call that never reached the District Center provided bad information.

Volunteer Scenario Call Review

I&A Site	Call Handler	Appropriateness of Referral	Caller's Comments
<i>Non co-located sites</i>			
Impact Northwest North	Supervisor	1	Appears to have reached I&A, asked many clarifying questions, and explained various volunteer opportunities at the center and elsewhere
Impact Northwest North	Receptionist & others	Not enough information to evaluate	Received auto operator, left message for I&A, then went to receptionist who directed to Development Dept. Called Development Dept., put on hold for 5 minutes, sent to Impact NW, receptionist immediately transferred to Community Involvement Dept. where caller left message. No call back.
Central Helpline	I&A Specialist	1	asked 5+ clarifying questions, made 3 referrals and directed to agency website that has broad range of volunteer opportunities
Hollywood Senior Center	Receptionist	3.5	Asked one question of caller, all volunteer tasks were limited to senior center
Hollywood Senior Center	Receptionist	3	Receptionist gave caller some possible volunteer assignments but encouraged caller to come in and talk with someone. Caller heard a lot of background noise and felt rushed, "I surmised that she wanted to be helpful but was busy."
Friendly House	Supervisor	3	Caller received a return message from supervisor. She was described as warm and receptive. Caller did not return call.
Neighborhood House Downtown	Receptionist & Activities Coordinator	3	Caller was given information to volunteer at L&F by receptionist though she said she did not want to volunteer there. Caller was referred to their Activities Coordinator who was curious why she was referred by their receptionist. Activities Co. was described as, "very helpful but really had no information."
Urban League	I&A Specialist	Not enough information to evaluate	Call was answered by receptionist and she was directed to I&A voice mail. The call was never returned. Caller's notes reflect frustration with the interaction. "I think they could have done a better job."
<i>Co-located Sites</i>			
IRCO	Branch Receptionist	Not enough information to evaluate	Appears this call never made it to IRCO. Caller was told volunteers were not needed at their office.
East YWCA	unknown		

RESULTS OF CALL LOGISTICS: ALL SITES

- Of the 110 calls, 4.5% of callers were greeted by a busy signal on their first call.
- A large majority of the calls were answered immediately, after 1 or 2 rings (72.7%) or quickly, less than 5 rings (20.9%). 4.5% of the calls were answered from 6 to 15 rings and one call had to wait more than 15 rings. Overall, 94.5% of calls were answered in less than 5 rings.
- Most calls were answered by a person (83.6%) as compared to being answered by voicemail or an auto attendant (16.4%)
 - Of those who received voicemail, 44% reported they understood the instructions very well and 33% said they understood somewhat well. The instructions were understood only a little or not at all by 22% of those who received voice mail.
 - Most voicemail calls were returned either in the same hour (20%) or within the same day the message was left (30%). Another 30% of the voicemail calls were returned within the same week and 10% of the calls were not returned for more than a week.
- If a caller was sent to voicemail, they recorded whether or not the call was returned by voicemail. 2 calls were reported to never have a call back from any staff at the I&A site.
- Nearly half of the calls were transferred to another operator (47.3%).
 - If transferred, callers received a person 67% of the time and voicemail 31% of the time.
 - If callers were sent to voicemail after first talking to a receptionist, the calls were mostly returned within the same hour or same day (92%).

RESULTS FOR CO-LOCATED AND NON CO-LOCATED DISTRICT CENTER

We evaluated whether or not there were significant differences between co-located and non-co-located District Center sites. The District Centers that are co-located with Aging & Disability Services Medicaid branch offices are Impact Northwest District Senior Center Services, IRCO District Senior Center Services and East YWCA District Senior Center Services. Central Helpline was not included in this part of the analysis.

We found no significant differences between co-located and non co-located sites. The following variables had **no statistically significant differences** between the two types of District Centers, equal variances assumed:

- Average score of the appropriateness of referral as given by the two I&A experts
- I&A call handler listened carefully to what caller wanted
- I&A call handler understood what caller wanted
- I&A call handler explained information in a way caller could understand
- Rating of overall call handling
- Number of referrals made
- Number of clarifying questions

The only factor that had some significant difference between co-located and non co-located sites was whether or not the caller was referred to other agencies or programs. Non co-located sites were less likely to refer a caller to another resource than co-located sites ($p=.054$). The following page shows the specific results for co-located and non co-located responses.

RESULTS FOR CO-LOCATED & NON CO-LOCATED DISTRICT CENTERS, con't

Co-located District Centers:

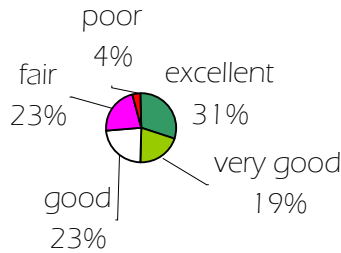
Average number of referrals made during calls: **2**
 Average rating for appropriateness of referral: **1.75**
 Average number of questions asked during calls: **2**

Non Co-located District Centers:

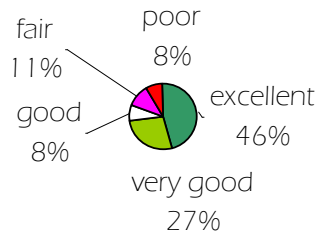
Average number of referrals made during calls: **2**
 Average rating for appropriateness of referral: **1.83**
 Average number of questions asked during calls: **2**

CO-LOCATED

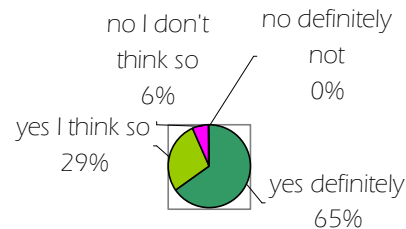
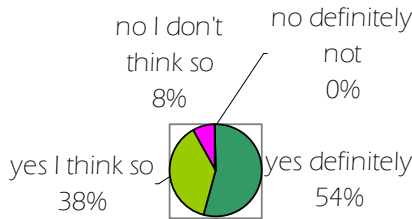
Rate the way your call was handled



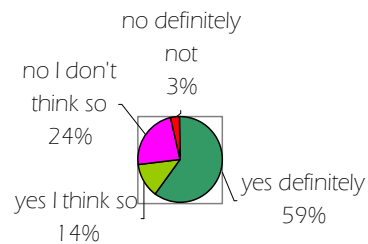
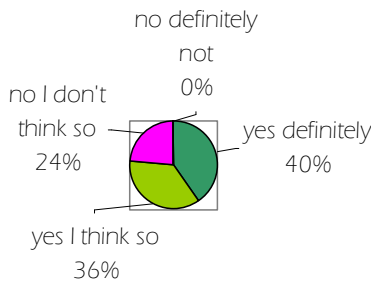
NON CO-LOCATED



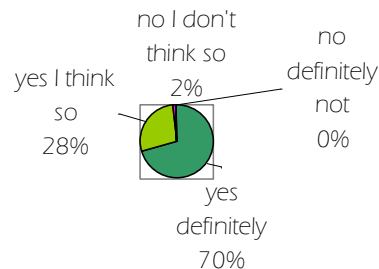
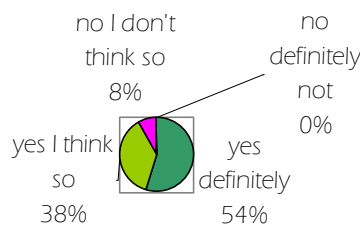
Did the I&A call handler listen carefully to what you wanted?



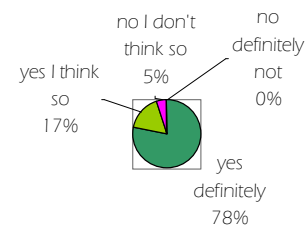
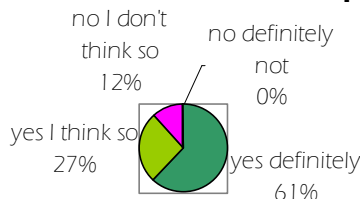
Did you receive the information/advice that you were looking for?



Did the I&A call handler understand what you wanted?



Did the I&A call handler explain things in a way you could understand?



RESULTS FOR CENTRAL HELPLINE AT MULTOMAH COUNTY ADS

Central Helpline:

Average number of referrals made during calls:

3

Average rating for appropriateness of referral:

1.72

Average number of questions asked during calls:

2

All sites:

Average number of referrals made during calls:

2

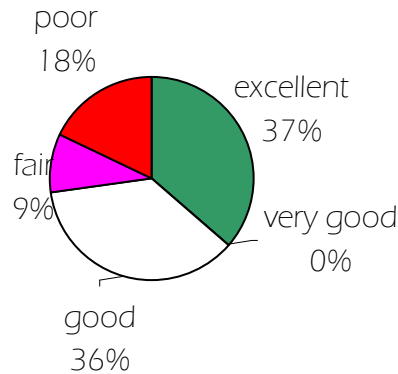
Average rating for appropriateness of referral:

1.81

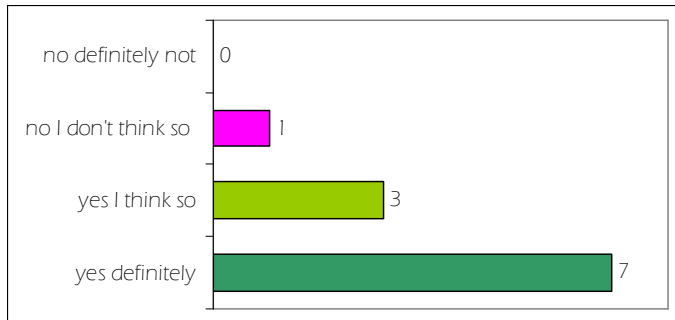
Average number of questions asked during calls:

2

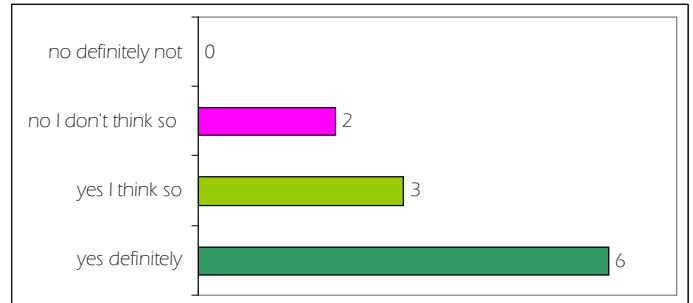
Rate the way your call was handled



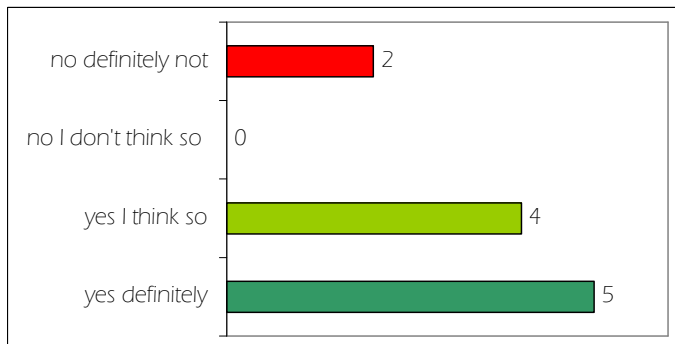
Did the I&A call handler listen carefully to what you wanted?



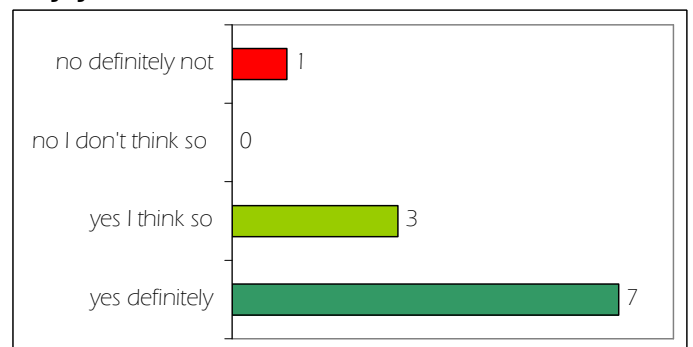
Did the I&A call handler understand what you wanted?



Did you receive the information/advice that you were looking for?



Did the I&A call handler explain things in a way you could understand?



RESULTS FOR EAST YWCA DISTRICT SENIOR CENTER SERVICES

East YWCA:

Average number of referrals made during calls:

1

Average rating for appropriateness of referral:

1.71

Average number of questions asked during calls:

1

All sites:

Average number of referrals made during calls:

2

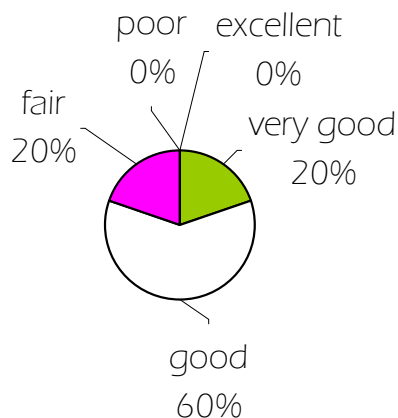
Average rating for appropriateness of referral:

1.81

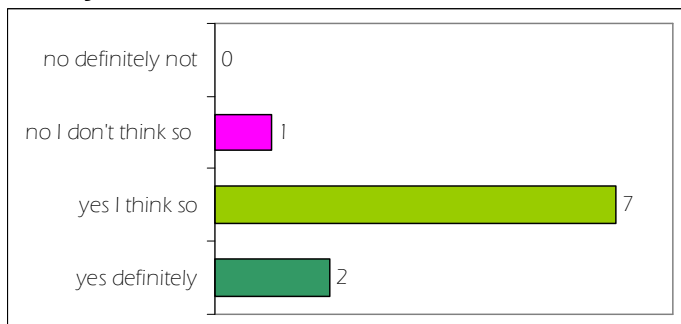
Average number of questions asked during calls:

2

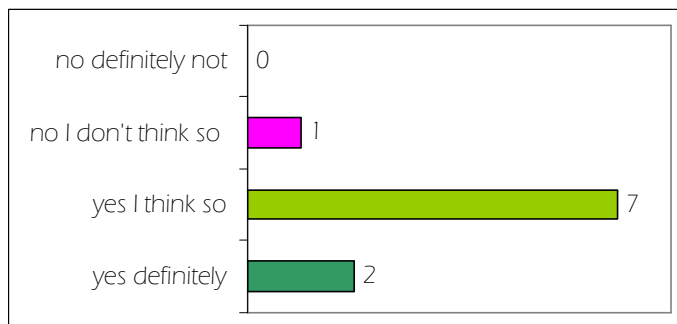
Rate the way your call was handled



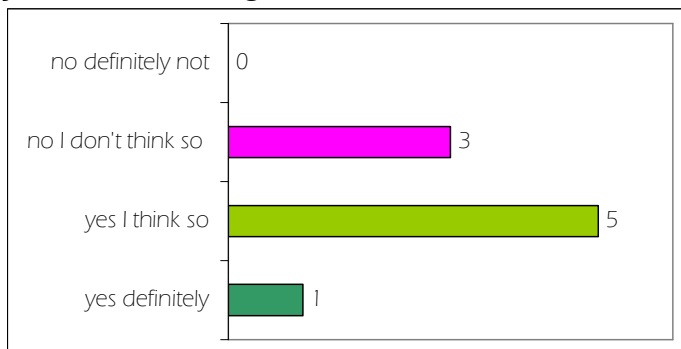
Did the I&A call handler listen carefully to what you wanted?



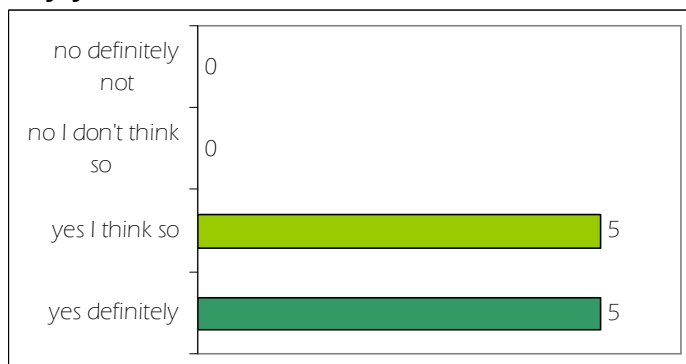
Did the I&A call handler understand what you wanted?



Did you receive the information/advice that you were looking for?



Did the I&A call handler explain things in a way you could understand?



RESULTS FOR FRIENDLY HOUSE DISTRICT SENIOR CENTER SERVICES

Friendly House:

Average number of referrals made during calls:

2

Average rating for appropriateness of referral:

1.65

Average number of questions asked during calls:

2

All sites:

Average number of referrals made during calls:

2

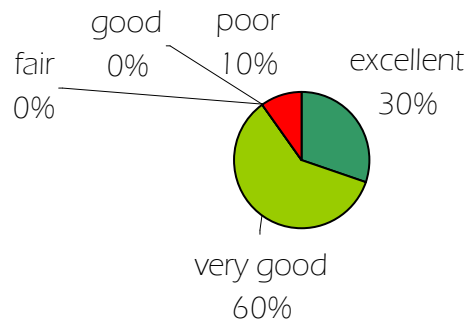
Average rating for appropriateness of referral:

1.81

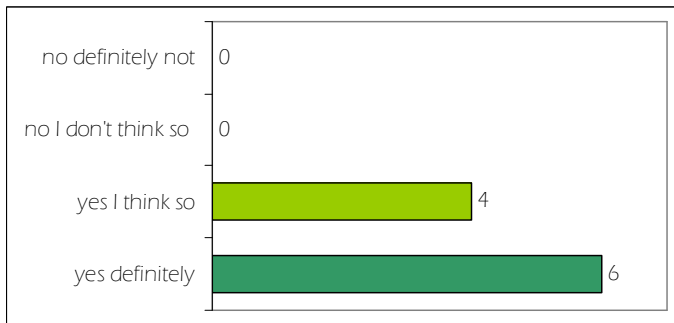
Average number of questions asked during calls:

2

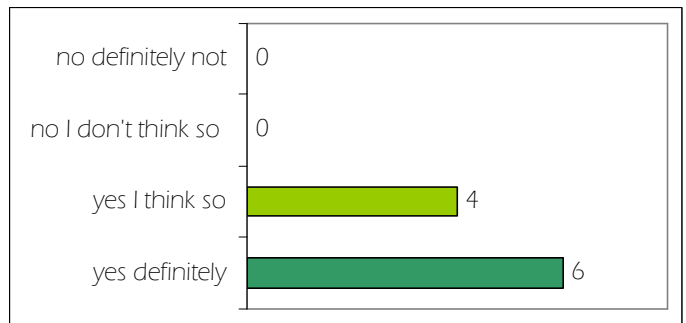
Rate the way your call was handled



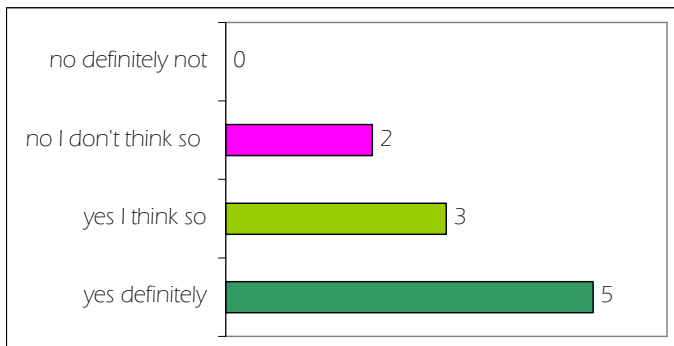
Did the I&A call handler listen carefully to what you wanted?



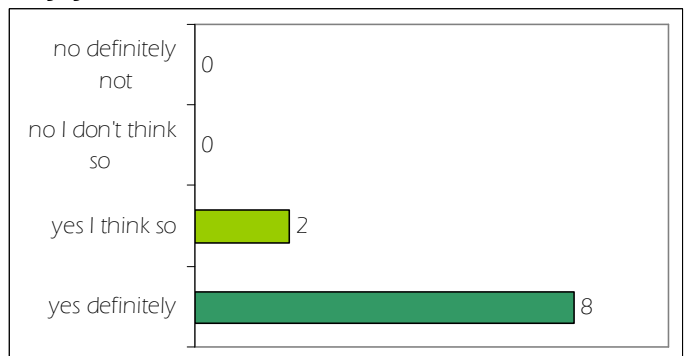
Did the I&A call handler understand what you wanted?



Did you receive the information/advice that you were looking for?



Did the I&A call handler explain things in a way you could understand?



RESULTS FOR HOLLYWOOD DISTRICT SENIOR CENTER SERVICES

Hollywood:

Average number of referrals made during calls:

1

Average rating for appropriateness of referral:

2.23

Average number of questions asked during calls:

2

All sites:

Average number of referrals made during calls:

2

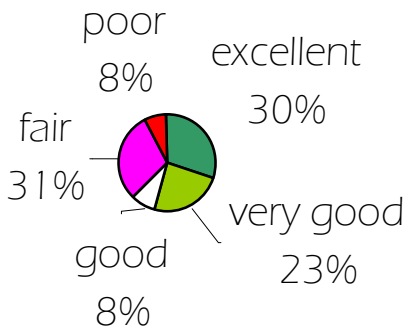
Average rating for appropriateness of referral:

1.81

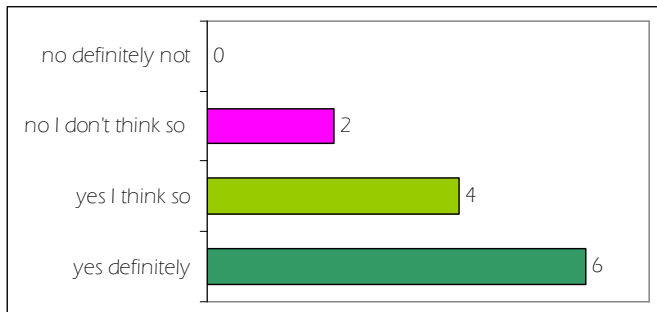
Average number of questions asked during calls:

2

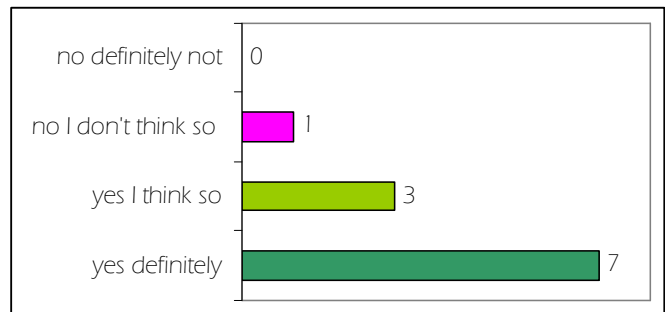
Rate the way your call was handled



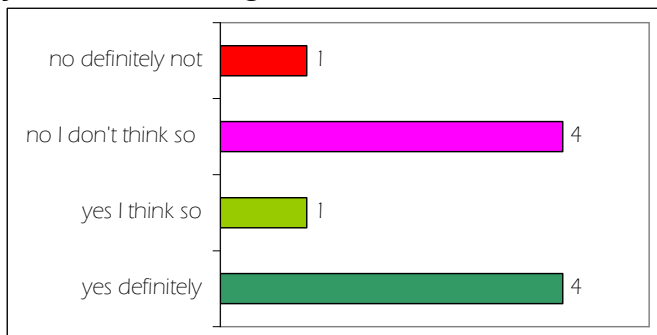
Did the I&A call handler listen carefully to what you wanted?



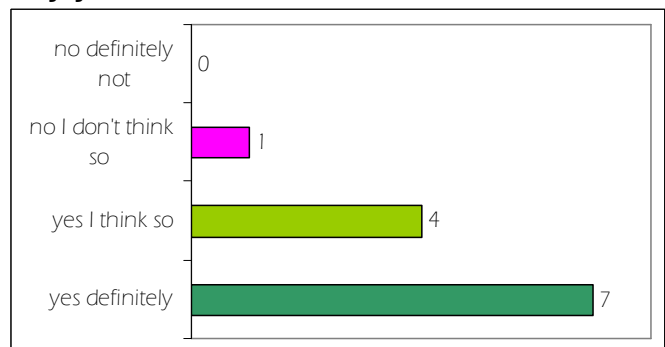
Did the I&A call handler understand what you wanted?



Did you receive the information/advice that you were looking for?



Did the I&A call handler explain things in a way you could understand?



RESULTS FOR **IMPACT NORTHWEST SE DISTRICT SENIOR CTR SERVICES**

Impact NW SE:

Average number of referrals made during calls:

2

Average rating for appropriateness of referral:

1.69

Average number of questions asked during calls:

3

All sites:

Average number of referrals made during calls:

2

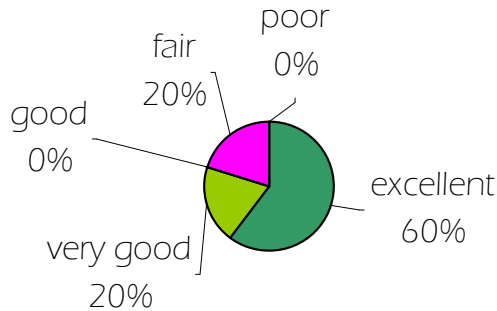
Average rating for appropriateness of referral:

1.81

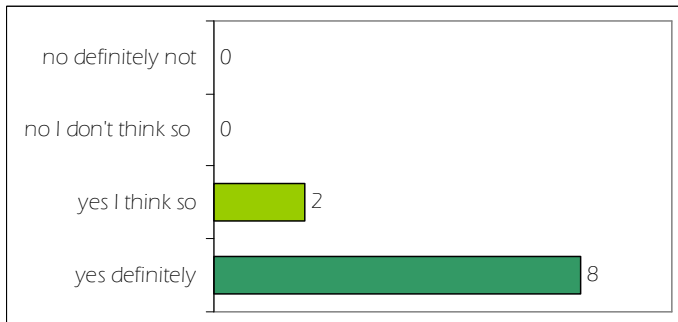
Average number of questions asked during calls:

2

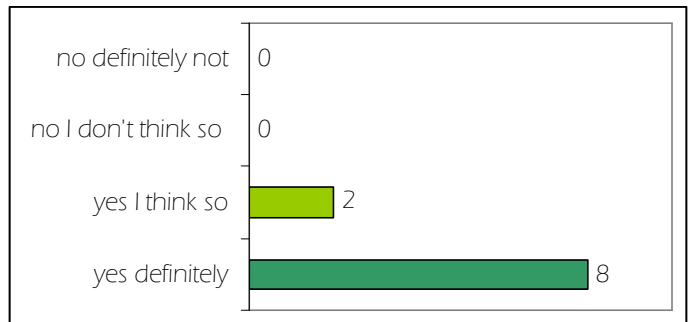
Rate the way your call was handled



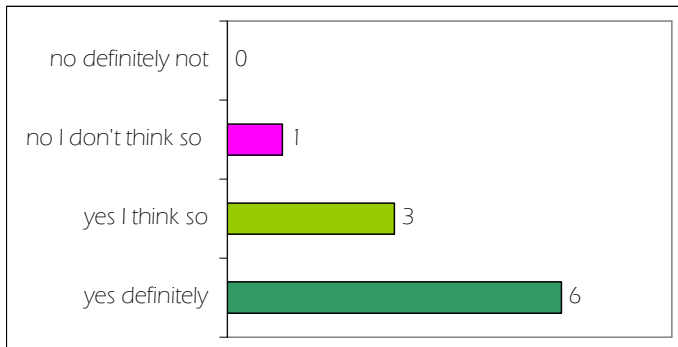
Did the I&A call handler listen carefully to what you wanted?



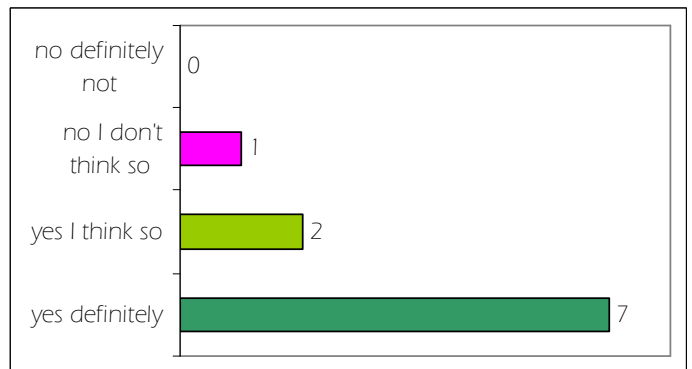
Did the I&A call handler understand what you wanted?



Did you receive the information/advice that you were looking for?



Did the I&A call handler explain things in a way you could understand?



RESULTS FOR **IMPACT NW NORTH DISTRICT SENIOR CENTER SERVICES**

Impact NW North DC:

Average number of referrals made during calls:

2

Average rating for appropriateness of referral:

1.50

Average number of questions asked during calls:

4

All sites:

Average number of referrals made during calls:

2

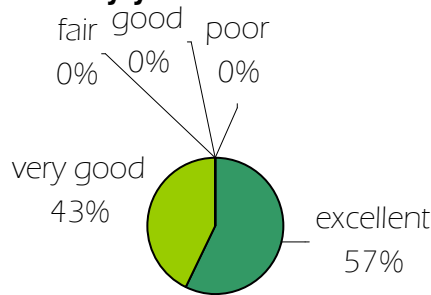
Average rating for appropriateness of referral:

1.81

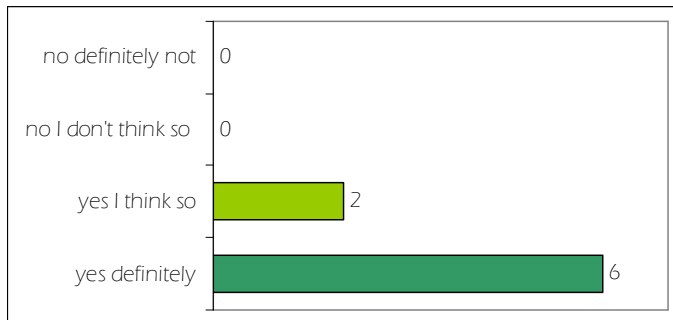
Average number of questions asked during calls:

2

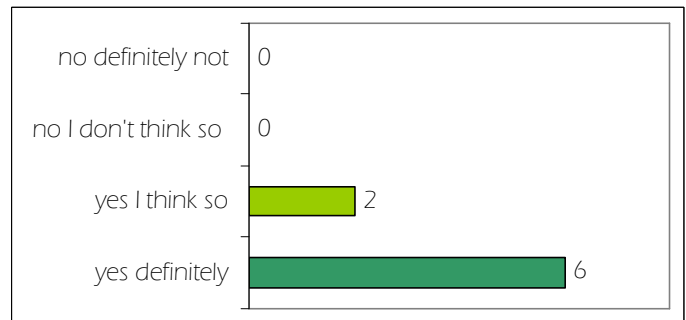
Rate the way your call was handled



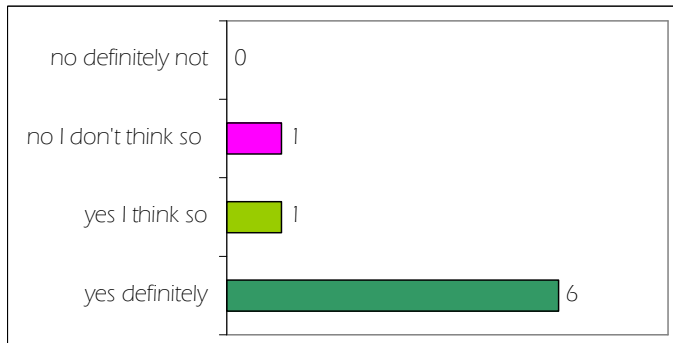
Did the I&A call handler listen carefully to what you wanted?



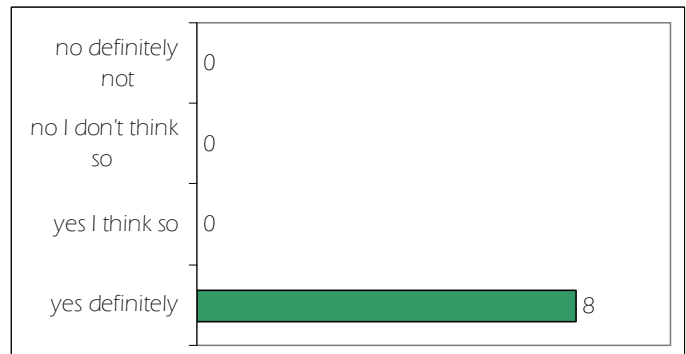
Did the I&A call handler understand what you wanted?



Did you receive the information/advice that you were looking for?



Did the I&A call handler explain things in a way you could understand?



RESULTS FOR IRCO DISTRICT SENIOR CENTER SERVICES

IRCO:

Average number of referrals made during calls:

3

Average rating for appropriateness of referral:

2.00

Average number of questions asked during calls:

2

All sites:

Average number of referrals made during calls:

2

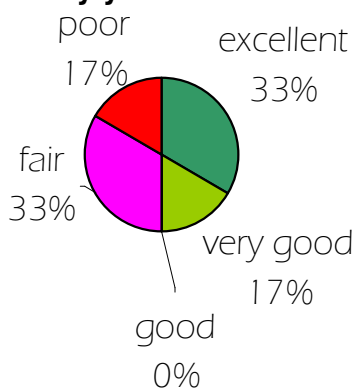
Average rating for appropriateness of referral:

1.81

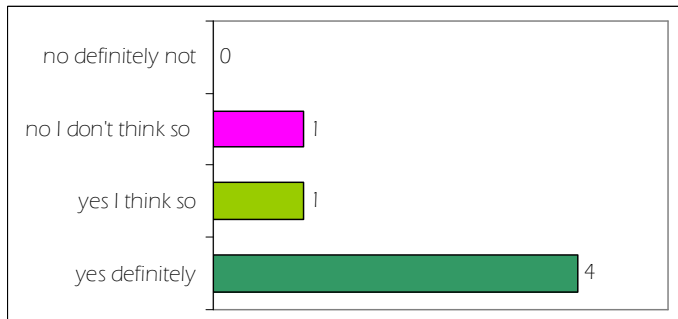
Average number of questions asked during calls:

2

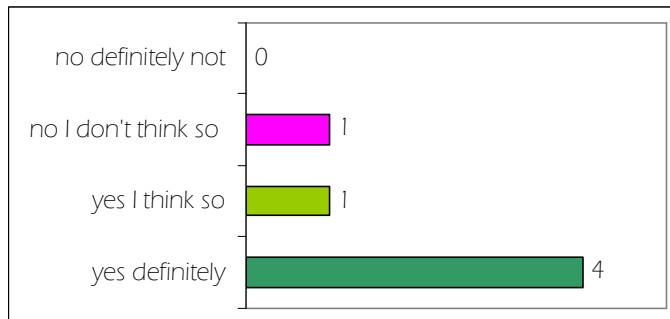
Rate the way your call was handled



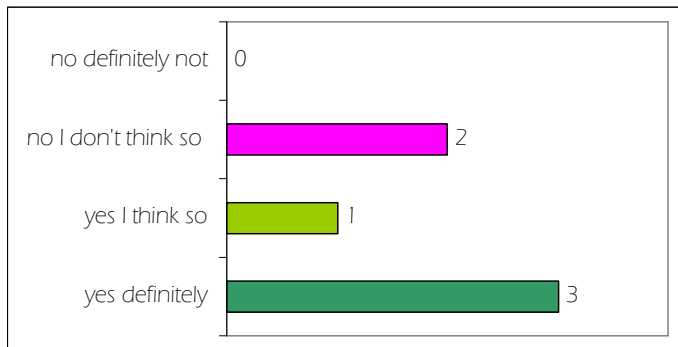
Did the I&A call handler listen carefully to what you wanted?



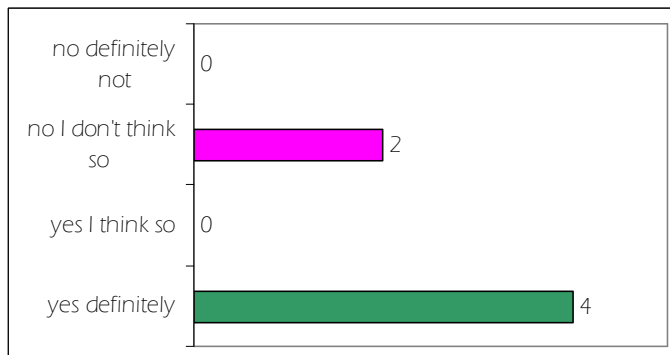
Did the I&A call handler understand what you wanted?



Did you receive the information/advice that you were looking for?



Did the I&A call handler explain things in a way you could understand?



RESULTS FOR NEIGHBORHOOD HOUSE SW DISTRICT SENIOR CTR SVCS

Neighborhood House SW:

Average number of referrals made during calls:

3

Average rating for appropriateness of referral:

1.40

Average number of questions asked during calls:

2

All sites:

Average number of referrals made during calls:

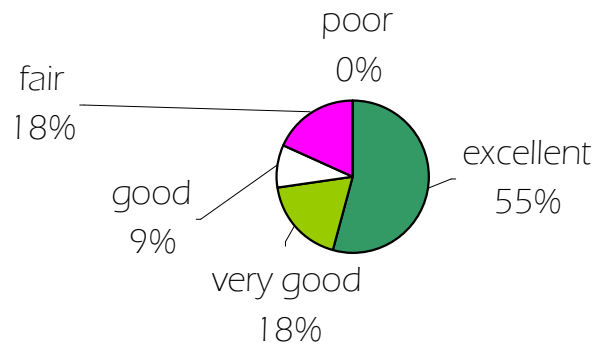
2

Average rating for appropriateness of referral:

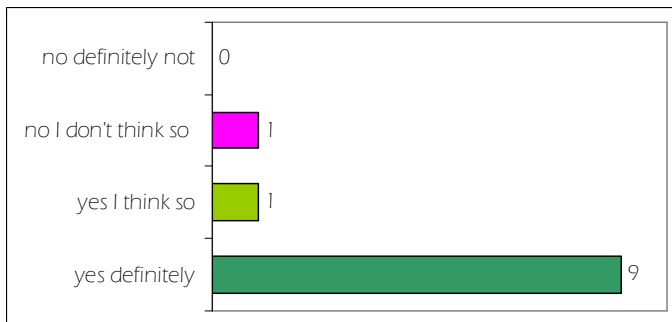
1.81

Average number of questions asked during calls:

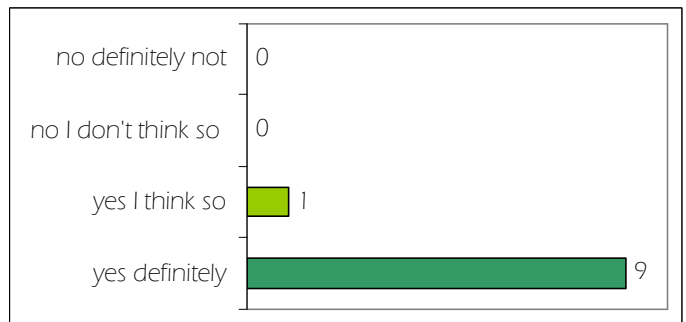
Rate the way your call was handled



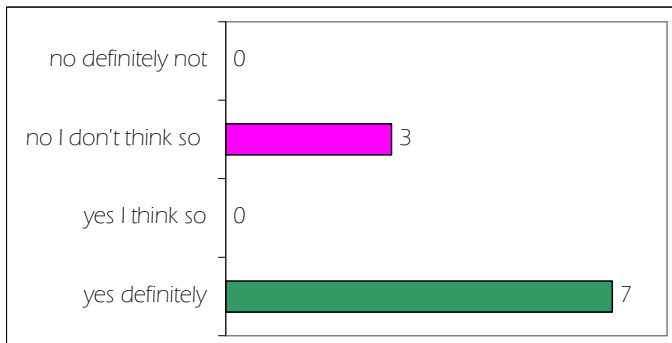
Did the I&A call handler listen carefully to what you wanted?



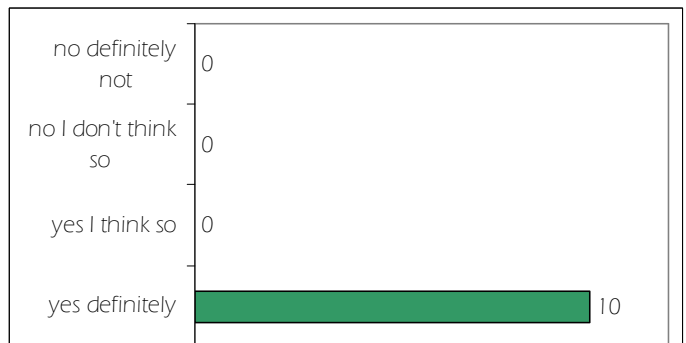
Did the I&A call handler understand what you wanted?



Did you receive the information/advice that you were looking for?



Did the I&A call handler explain things in a way you could understand?



RESULTS FOR NEIGHBORHOOD HOUSE DOWNTOWN DISTRICT SENIOR CENTER SERVICES

Neighborhood House DT:

Average number of referrals made during calls: **2**

Average rating for appropriateness of referral: **1.89**

Average number of questions asked during calls: **2**

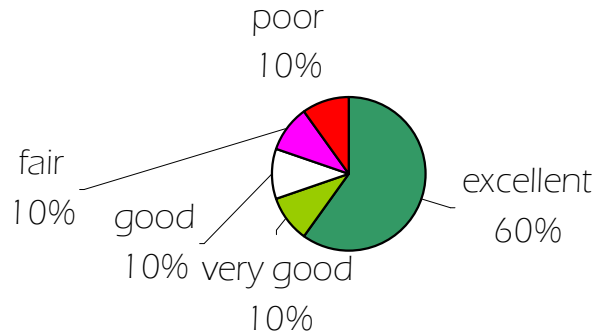
All sites:

Average number of referrals made during calls: **2**

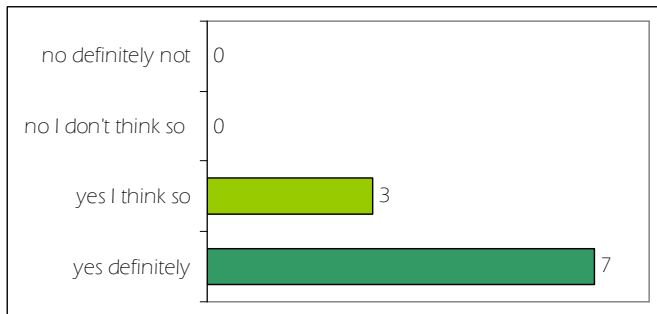
Average rating for appropriateness of referral: **1.81**

Average number of questions asked during calls: **2**

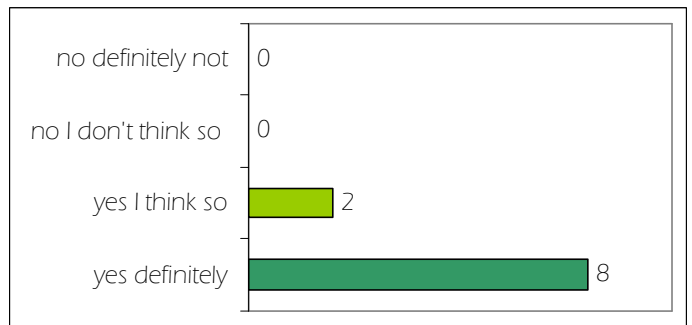
Rate the way your call was handled



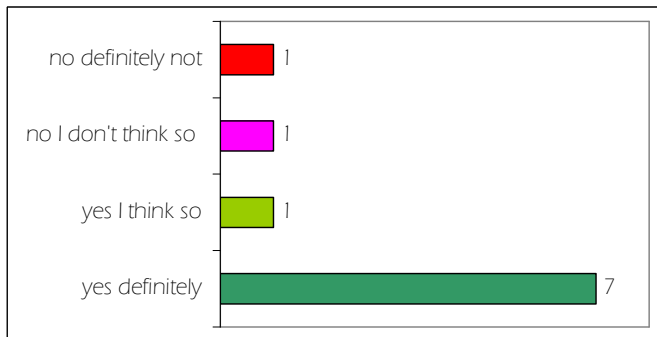
Did the I&A call handler listen carefully to what you wanted?



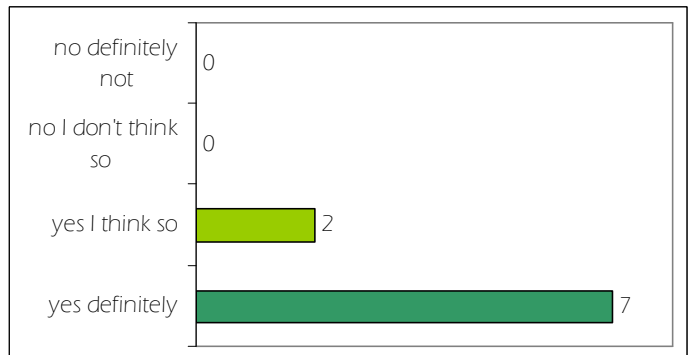
Did the I&A call handler understand what you wanted?



Did you receive the information/advice that you were looking for?



Did the I&A call handler explain things in a way you could understand?



RESULTS FOR URBAN LEAGUE DISTRICT SENIOR CENTER SERVICES

Urban League:

Average number of referrals made during calls:

2

Average rating for appropriateness of referral:

2.22

Average number of questions asked during calls:

2

All sites:

Average number of referrals made during calls:

2

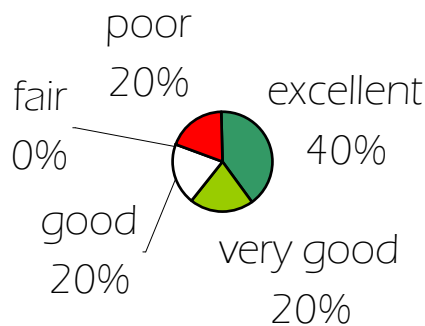
Average rating for appropriateness of referral:

1.81

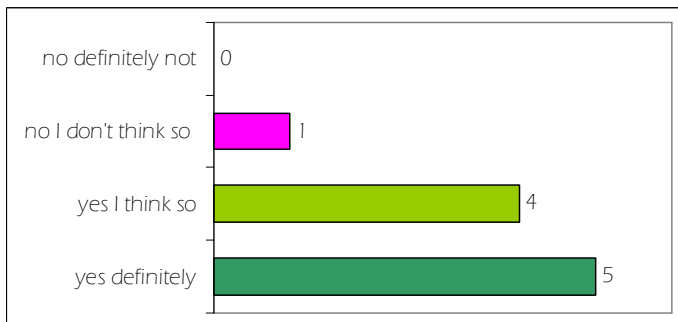
Average number of questions asked during calls:

2

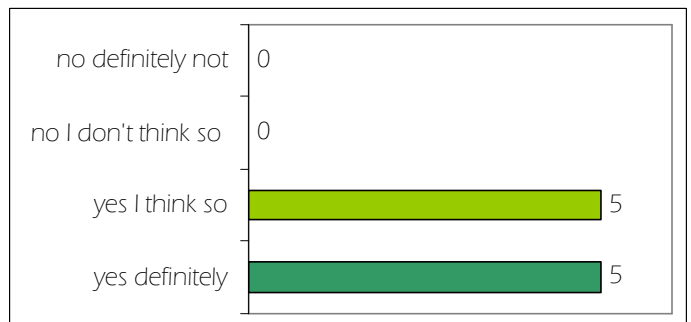
Rate the way your call was handled



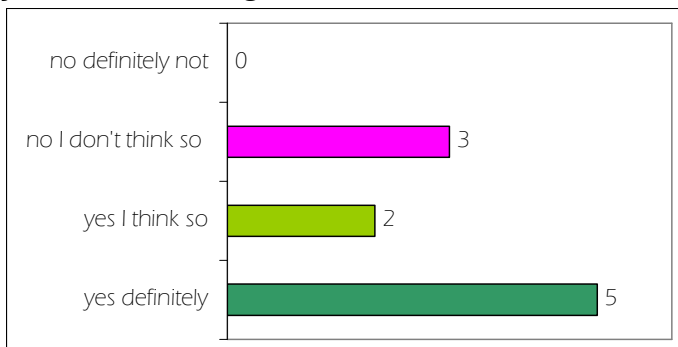
Did the I&A call handler listen carefully to what you wanted?



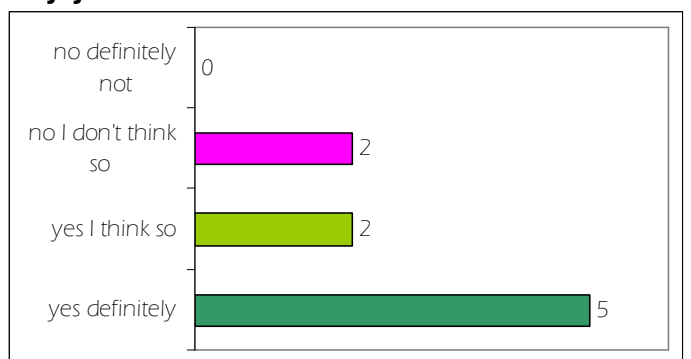
Did the I&A call handler understand what you wanted?



Did you receive the information/advice that you were looking for?



Did the I&A call handler explain things in a way you could understand?



EVALUATION CONSIDERATIONS

The project was a large undertaking for Elders in Action and we are grateful for all the coordination and time from staff and volunteers. If the study were to be conducted again, we would use fewer volunteers and unify our training procedures. We would continue to provide in person training and do some practice calls before the volunteers contacted an Information & Assistance site. We would want to conduct the Secret Shopper calls within a very short period of time to eliminate any time-based differences. We would also hope to increase the number of secret shopper calls.

We would also make the specific study design changes:

- We would record length of call, collect more information about what type of referrals were being made, and ask more specifically about calls that were not returned.
- We would record the number of times the caller was put on hold and the duration of holds.
- We would provide a telephone number that volunteers could give to the I&A call handler if they wanted to do a follow-up call, rather than using their home phone number.
- Scenarios where a caller was calling on someone's behalf other than their own would have enough details that the I&A call handler could proceed with the call
- We may also enter in fake clients into OR Access because call handlers often employed best practices of trying to look up the fake caller in the various state and local data systems.

NEXT STEPS

Multnomah County Aging & Disability Services (ADS) will be meeting with District Center Executive Directors, Program Managers and I&A Specialists to determine the appropriate next steps to this evaluation. We will also be soliciting feedback from ADS management, ADS Community Services, ADS advisory councils and an Aging & Disability Resource Center consultant for Multnomah County. We will review relevant findings with state-wide Information & Assistance networks to help determine any needed changes and replicate best practices. As the conversation continues with our community partners, we will be publishing any recommendations on the Multnomah County ADS website, <http://www.multco.us>.

Questions? Comments?

For additional analysis, presentations or questions about the Information & Assistance Secret Shopper project and report, please contact:

- Elizabeth O'Neill, Research & Evaluation Analyst 1, Multnomah County Aging & Disability Services Community Services: Elizabeth.o'neill@multco.us, 503-988-3620 x22774
- Paul Iarrobino, Program Supervisor for Multnomah County Aging & Disability Services Community Services: Paul.iarrobino@multco.us, 503-988-3620 x24030