## INFORMATION AND REFERRAL/ASSISTANCE PROGRAM

### Statewide Semi-Annual Report

**Introduction/Purpose**

The purpose of the Statewide Semi-Annual Information and Referral/Assistance (I&R/A) Report is to provide programmatic insight of service productivity for the I&R/A Program as a whole. The On-Line Support Assistant (OLSA) software is utilized to generate an all-encompassing report to account for service delivery through the aging network's I&R/A Program. This report will be inclusive of the total contact volume, outreach efforts, and recorded unmet needs. The LGOA shall conduct a programmatic analysis via the Statewide Semi-Annual report twice a year to promote agency accountability and to enhance comprehensive application of data recorded. For monitoring purposes, performance goals and outcome measures will be evaluated based on the data recorded in OLSA.

### Report Outline

I. Programmatic Insight/Key Findings

II. Data Related Reporting (Overall Contacts vs. Unduplicated Clients)

    a. Total Contact Volume

    b. Program Contacts

    c. Outreach Efforts

    d. Unmet Needs

    III. What's New?

IV. Quarterly I&R/A Report Feedback

V. I&R/A Program Analysis and Summary

VI. Conclusion and Action Plan

Note: The following data is comprehensive of the Lieutenant Governor's Office on Aging (LGOA), as well as all ten (10) Area Agencies on aging (AAAs)/Aging and Disability Resource Centers (ADRCs) for the time period of January 2014 through June 2014; this information was pulled on 7/18/2014; any information inputted for this time period after this date will not be included.

## I. Programmatic Insight/Key Findings

1. The total contact volume for the first two quarters of 2014 is equal to 47,790 overall contacts for the entire aging network, of which only 26,686 (56%) were unduplicated clients.
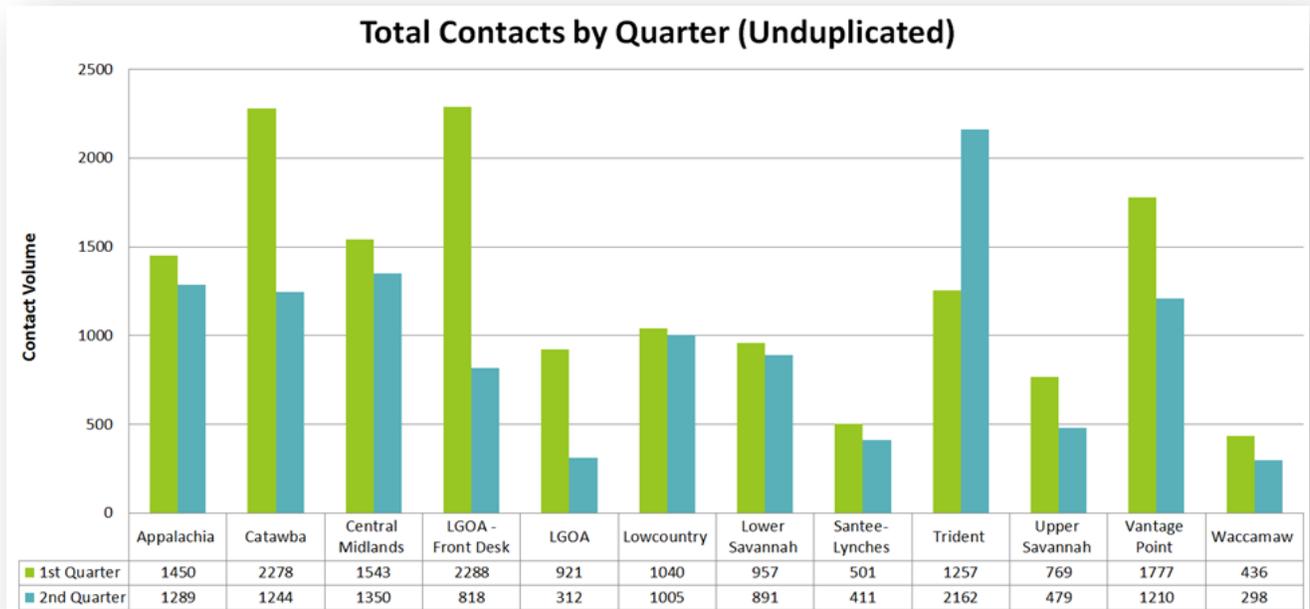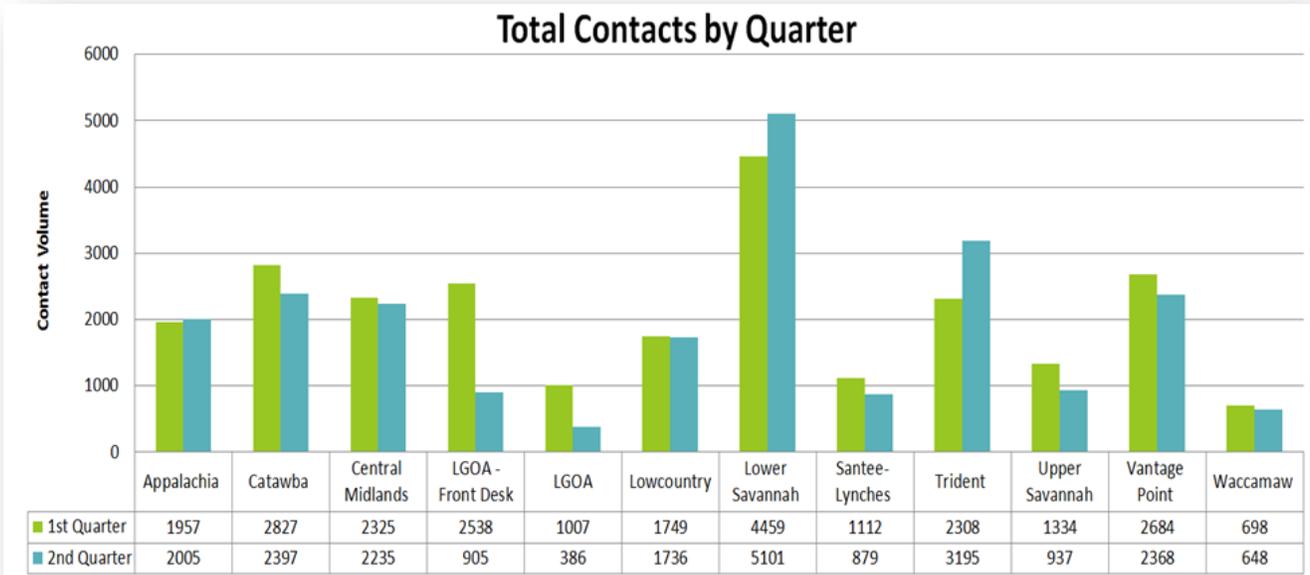
(Overall Contact Numbers)

| Contact Agency Name | 1st Quarter | 2nd Quarter | Grand Total |
|---|---|---|---|
| Appalachia | 1957 | 2005 | 3962 |
| Catawba | 2827 | 2397 | 5224 |
| Central Midlands | 2325 | 2235 | 4560 |
| LGOA - Front Desk | 2538 | 905 | 3443 |
| LGOA | 1007 | 386 | 1393 |
| Lowcountry | 1749 | 1736 | 3485 |
| Lower Savannah | 4459 | 5101 | 9560 |
| Santee-Lynches | 1112 | 879 | 1991 |
| Trident | 2308 | 3195 | 5503 |
| Upper Savannah | 1334 | 937 | 2271 |
| Vantage Point | 2684 | 2368 | 5052 |
| Waccamaw | 698 | 648 | 1346 |
| **Grand Total** | **24998** | **22792** | **47790** |

(Unduplicated Contact Numbers)

| Contact Agency Name | 1st Quarter | 2nd Quarter | Grand Total |
|---|---|---|---|
| Appalachia | 1450 | 1289 | 2739 |
| Catawba | 2278 | 1244 | 3522 |
| Central Midlands | 1543 | 1350 | 2893 |
| LGOA - Front Desk | 2288 | 818 | 3106 |
| LGOA | 921 | 312 | 1233 |
| Lowcountry | 1040 | 1005 | 2045 |
| Lower Savannah | 957 | 891 | 1848 |
| Santee-Lynches | 501 | 411 | 912 |
| Trident | 1257 | 2162 | 3419 |
| Upper Savannah | 769 | 479 | 1248 |
| Vantage Point | 1777 | 1210 | 2987 |
| Waccamaw | 436 | 298 | 734 |
| **Grand Total** | **15217** | **11469** | **26686** |

Note: The following data is comprehensive of the Lieutenant Governor's Office on Aging (LGOA), as well as all ten (10) Area Agencies on aging (AAAs)/Aging and Disability Resource Centers (ADRCs) for the time period of January 2014 through June 2014; this information was pulled on 7/18/2014; any information inputted for this time period after this date will not be included.

2. The contact volume for the aging network's I&R/A Program has decreased overall by approximately 9% from Quarter 1 (24,998) to Quarter 2 (22,792), and has also decreased in the number of unduplicated clients reached by approximately 14% from Quarter 1 (15,217) to Quarter 2 (11,469).

**Total Contacts by Quarter**

| | Appalachia | Catawba | Central Midlands | LGOA - Front Desk | LGOA | Lowcountry | Lower Savannah | Santee-Lynches | Trident | Upper Savannah | Vantage Point | Waccamaw |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1st Quarter | 1957 | 2827 | 2325 | 2538 | 1007 | 1749 | 4459 | 1112 | 2308 | 1334 | 2684 | 698 |
| 2nd Quarter | 2005 | 2397 | 2235 | 905 | 386 | 1736 | 5101 | 879 | 3195 | 937 | 2368 | 648 |

**Total Contacts by Quarter (Unduplicated)**

| | Appalachia | Catawba | Central Midlands | LGOA - Front Desk | LGOA | Lowcountry | Lower Savannah | Santee-Lynches | Trident | Upper Savannah | Vantage Point | Waccamaw |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1st Quarter | 1450 | 2278 | 1543 | 2288 | 921 | 1040 | 957 | 501 | 1257 | 769 | 1777 | 436 |
| 2nd Quarter | 1289 | 1244 | 1350 | 818 | 312 | 1005 | 891 | 411 | 2162 | 479 | 1210 | 298 |

Note: The following data is comprehensive of the Lieutenant Governor's Office on Aging (LGOA), as well as all ten (10) Area Agencies on aging (AAAs)/Aging and Disability Resource Centers (ADRCs) for the time period of January 2014 through June 2014; this information was pulled on 7/18/2014; any information inputted for this time period after this date will not be included.

3.  49% of all contacts made for the first two quarters were I&R/A specific; 40% were SHIP specific; and 11% were Family Caregiver Specific.

## Percentage of Contacts Per Program

FCG 11%

SHIP 40%

IRA 49%
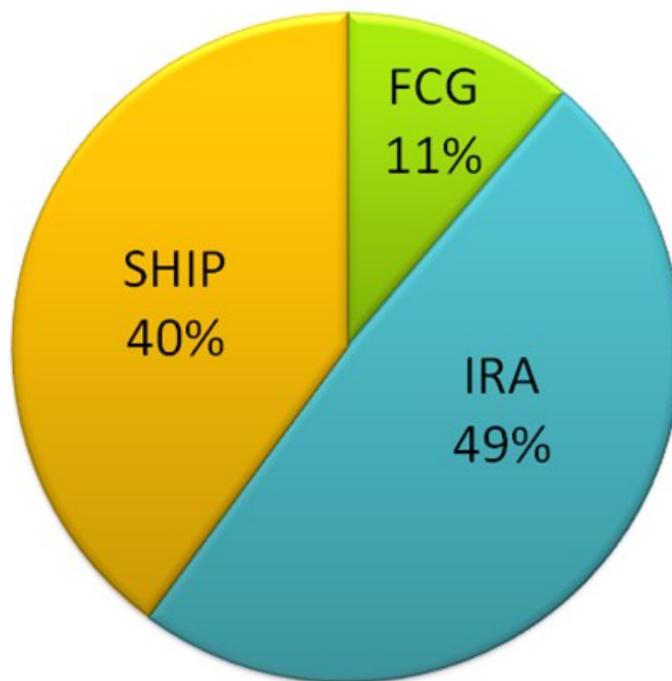
| Program | Total Contact Volume |
|---|---|
| Family Caregiver Program (FCG) | 5385 |
| Information and Referral/Assistance (I&R/A) | 23381 |
| State Health Insurance Program (SHIP) | 19103 |
| **Grand Total** | **47869** |

Note: The following data is comprehensive of the Lieutenant Governor's Office on Aging (LGOA), as well as all ten (10) Area Agencies on aging (AAAs)/Aging and Disability Resource Centers (ADRCs) for the time period of January 2014 through June 2014; this information was pulled on 7/18/2014; any information inputted for this time period after this date will not be included.

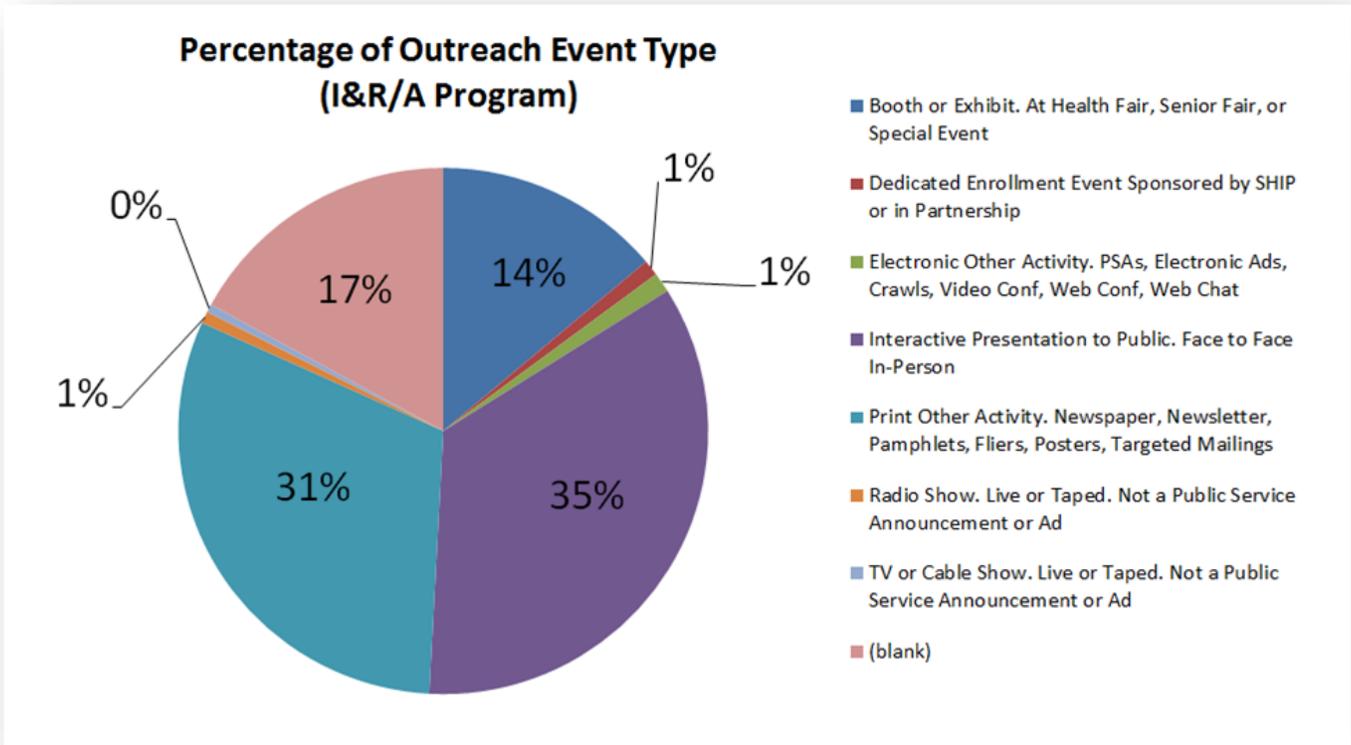4. According to the data recorded in OLSA, only 1% of all contacts made resulted in an unmet need.

## Total Unmet Needs Documented in OLSA
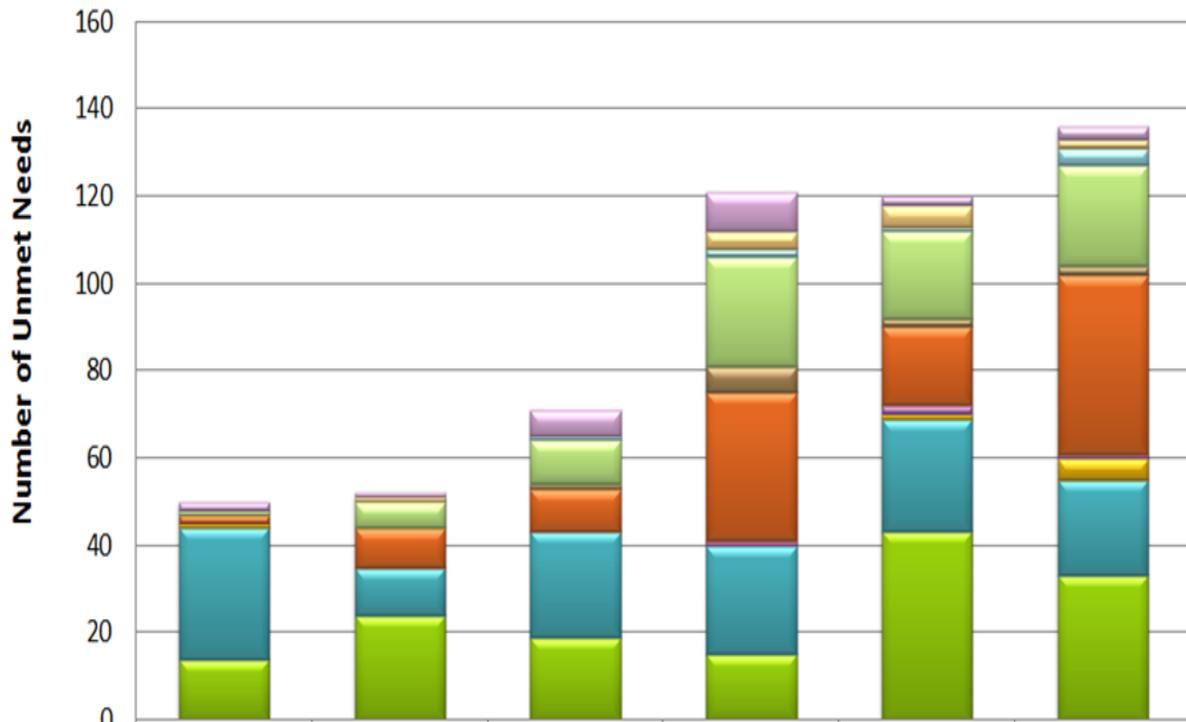
| | 2014-1 | 2014-2 | 2014-3 | 2014-4 | 2014-5 | 2014-6 |
|---|---|---|---|---|---|---|
| Waccamaw | 2 | 1 | 6 | 9 | 2 | 3 |
| Vantage Point | | 1 | | 4 | 5 | 2 |
| Upper Savannah | | | 1 | 2 | 1 | 4 |
| Trident | 1 | 6 | 10 | 25 | 20 | 23 |
| Santee-Lynches | | | 1 | 6 | 2 | 2 |
| Lower Savannah | 2 | 9 | 10 | 34 | 18 | 41 |
| Lowcountry | | | | 1 | 2 | 1 |
| LGOA | 1 | | | | 1 | 5 |
| Central Midlands | 30 | 11 | 24 | 25 | 26 | 22 |
| Appalachia | 14 | 24 | 19 | 15 | 43 | 33 |

Note: The following data is comprehensive of the Lieutenant Governor's Office on Aging (LGOA), as well as all ten (10) Area Agencies on aging (AAAs)/Aging and Disability Resource Centers (ADRCs) for the time period of January 2014 through June 2014; this information was pulled on 7/18/2014; any information inputted for this time period after this date will not be included.

5. The total number of outreach efforts recorded in OLSA increased by approximately --% from Quarter 1 to Quarter 2 (31% of outreach efforts were categorized as "Print Activities"; 30% were categorized as "Interactive Presentation to Public"; 23% had no event type listed; 12% were categorized as "Booth or Exhibit; and all other event types reported 1% or less.

### Percentage of Outreach Event Type (I&R/A Program)



- ■ Booth or Exhibit. At Health Fair, Senior Fair, or Special Event
- ■ Dedicated Enrollment Event Sponsored by SHIP or in Partnership
- ■ Electronic Other Activity. PSAs, Electronic Ads, Crawls, Video Conf, Web Conf, Web Chat
- ■ Interactive Presentation to Public. Face to Face In-Person
- ■ Print Other Activity. Newspaper, Newsletter, Pamphlets, Fliers, Posters, Targeted Mailings
- ■ Radio Show. Live or Taped. Not a Public Service Announcement or Ad
- ■ TV or Cable Show. Live or Taped. Not a Public Service Announcement or Ad
- ■ (blank)

6. *According to the 2013 census, 15.2% (~725,775) of South Carolina's population is senior citizens. Based on unduplicated contact volume alone, the aging network has assisted approximately 3.7% (FCG 0.5%; IRA 1.7%; SHIP 1.5%) of the South Carolina senior population from January 2014 to June 2014.

(*The 2013 census defines seniors as 65 and older.)
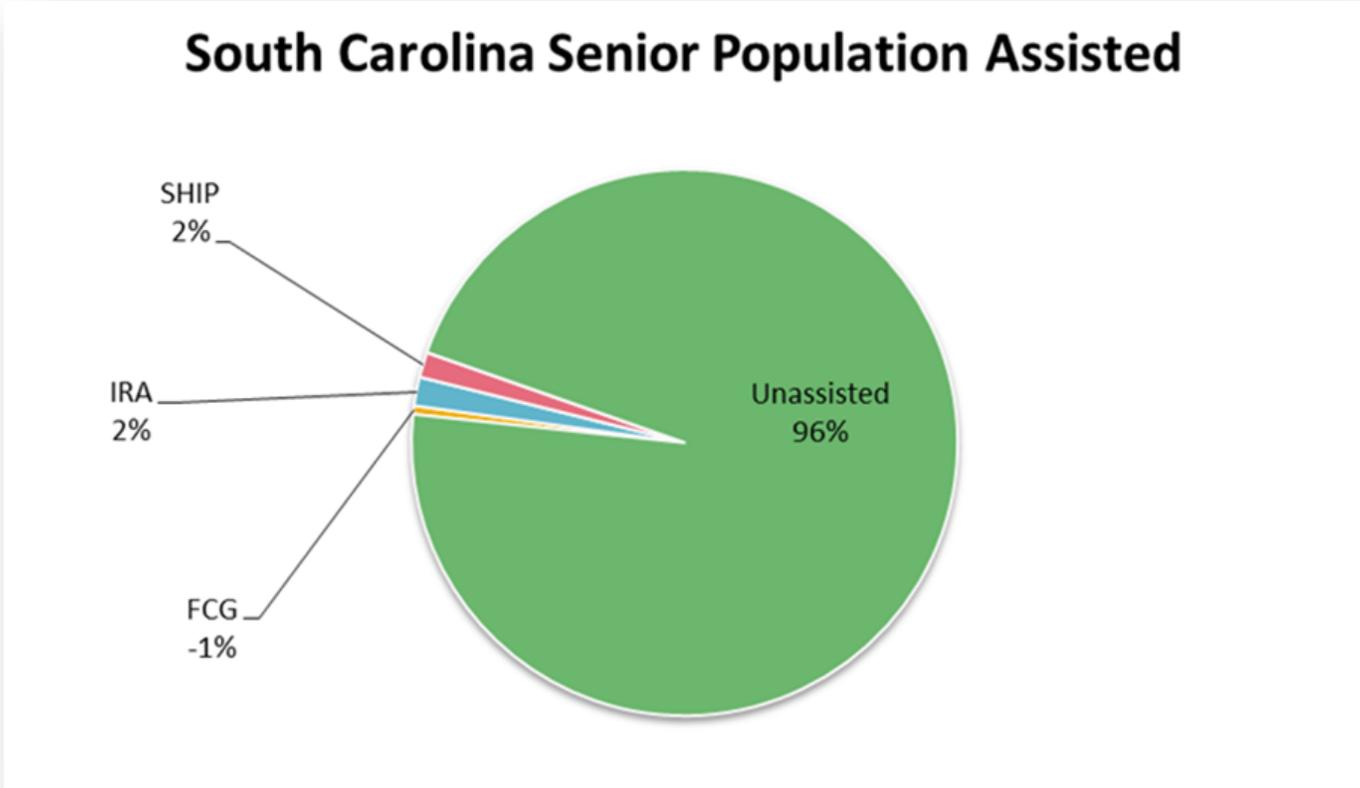
## South Carolina Senior Population Assisted

SHIP
2%

IRA
2%

Unassisted
96%

FCG
-1%

## II. Data Related Reporting

a. Total Contact Volume

The overall total contact volume depicts the number of contacts recorded by each agency for the said period of time; the unduplicated total contact volume depicts the number of unduplicated - unique client contacts recorded by each agency.

(Overall Contact Volume)

| Year-Month | Appalachia | Catawba | Central Midlands | LGOA-Front Desk | LGOA | Lowcountry | Lower Savannah | Santee-Lynches | Trident | Upper Savannah | Vantage Point | Waccamaw | Grand Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2014-1 | 730 | 911 | 934 | 709 | 441 | 555 | 1539 | 446 | 845 | 412 | 1083 | 193 | 8798 |
| 2014-2 | 474 | 808 | 549 | 868 | 333 | 483 | 1316 | 307 | 702 | 354 | 752 | 248 | 7194 |
| 2014-3 | 753 | 1108 | 842 | 961 | 233 | 711 | 1604 | 359 | 761 | 568 | 849 | 257 | 9006 |
| 2014-4 | 686 | 853 | 672 | 505 | 240 | 541 | 1576 | 367 | 675 | 321 | 862 | 181 | 7479 |
| 2014-5 | 726 | 841 | 832 | 246 | 104 | 591 | 1804 | 271 | 796 | 320 | 974 | 234 | 7739 |
| 2014-6 | 593 | 703 | 731 | 154 | 42 | 604 | 1721 | 241 | 1724 | 296 | 532 | 233 | 7574 |
| Grand Total | 3962 | 5224 | 4560 | 3443 | 1393 | 3485 | 9560 | 1991 | 5503 | 2271 | 5052 | 1346 | 47790 |

(Unduplicated Contacts — Unique Clients)

| Year-Month | Appalachia | Catawba | Central Midlands | LGOA - Front Desk | LGOA | Lowcountry | Lower Savannah | Santee-Lynches | Trident | Upper Savannah | Vantage Point | Waccamaw | Grand Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2014-1 | 569 | 841 | 632 | 653 | 407 | 399 | 417 | 183 | 530 | 265 | 761 | 152 | 5809 |
| 2014-2 | 338 | 674 | 375 | 778 | 299 | 278 | 222 | 156 | 330 | 207 | 492 | 150 | 4299 |
| 2014-3 | 543 | 763 | 536 | 857 | 215 | 363 | 318 | 162 | 397 | 297 | 524 | 134 | 5109 |
| 2014-4 | 460 | 494 | 431 | 456 | 200 | 292 | 228 | 205 | 341 | 166 | 412 | 72 | 3757 |
| 2014-5 | 481 | 356 | 485 | 221 | 84 | 349 | 345 | 129 | 478 | 159 | 469 | 111 | 3667 |
| 2014-6 | 348 | 394 | 434 | 141 | 28 | 364 | 318 | 77 | 1343 | 154 | 329 | 115 | 4045 |
| Grand Total | 2739 | 3522 | 2893 | 3106 | 1233 | 2045 | 1848 | 912 | 3419 | 1248 | 2987 | 734 | 26686 |

Note: The following data is comprehensive of the Lieutenant Governor's Office on Aging (LGOA), as well as all ten (10) Area Agencies on aging (AAAs)/Aging and Disability Resource Centers (ADRCs) for the time period of January 2014 through June 2014; this information was pulled on 7/18/2014; any information inputted for this time period after this date will not be included.

b. Program Contacts

Each agencies total contact volume, both overall and unduplicated—unique clients are reviewed as a whole, as well as filtered by program specific contacts to identify productivity per program.

(Overall Contact Volume)

| Contact Agency Name | FCG | IRA | SHIP | Grand Total |
|---|---|---|---|---|
| Appalachia | 381 | 1350 | 2231 | 3962 |
| Catawba | 51 | 328 | 4845 | 5224 |
| Central Midlands | 1351 | 2237 | 972 | 4560 |
| LGOA - Front Desk | 1 | 3442 | | 3443 |
| LGOA | 41 | 264 | 1088 | 1393 |
| Lowcountry | 498 | 1446 | 1541 | 3485 |
| Lower Savannah | 338 | 7667 | 1555 | 9560 |
| Santee-Lynches | 359 | 429 | 1203 | 1991 |
| Trident | 666 | 2237 | 2600 | 5503 |
| Upper Savannah | 717 | 616 | 938 | 2271 |
| Vantage Point | 359 | 3179 | 1514 | 5052 |
| Waccamaw | 623 | 186 | 537 | 1346 |
| **Grand Total** | **5385** | **23381** | **19024** | **47790** |

(Unduplicated Contacts — Unique Clients)

| Contact Agency Name | FCG | IRA | SHIP | Grand Total |
|---|---|---|---|---|
| Appalachia | 368 | 1201 | 1170 | 2739 |
| Catawba | 49 | 317 | 3156 | 3522 |
| Central Midlands | 628 | 1676 | 589 | 2893 |
| LGOA - Front Desk | 1 | 3105 | | 3106 |
| LGOA | 34 | 154 | 1045 | 1233 |
| Lowcountry | 296 | 958 | 791 | 2045 |
| Lower Savannah | 253 | 1063 | 532 | 1848 |
| Santee-Lynches | 329 | 261 | 322 | 912 |
| Trident | 401 | 1194 | 1824 | 3419 |
| Upper Savannah | 516 | 313 | 419 | 1248 |
| Vantage Point | 303 | 1672 | 1012 | 2987 |
| Waccamaw | 186 | 164 | 384 | 734 |
| **Grand Total** | **3364** | **12078** | **11244** | **26686** |

Note: The following data is comprehensive of the Lieutenant Governor's Office on Aging (LGOA), as well as all ten (10) Area Agencies on aging (AAAs)/Aging and Disability Resource Centers (ADRCs) for the time period of January 2014 through June 2014; this information was pulled on 7/18/2014; any information inputted for this time period after this date will not be included.

c. Outreach Efforts

| Outreach Event Type | Appalachia | Catawba | Central Midlands | LGOA | Lowcountry | Lower Savannah | Santee-Lynches | Trident | Upper Savannah | Vantage Point | Waccamaw | Grand Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Booth or Exhibit. At Health Fair, Senior Fair, or Special Event | 18 | 1 | 10 | 5 | | 5 | 3 | 2 | 1 | 9 | 3 | 57 |
| Dedicated Enrollment Event Sponsored by SHIP or in Partnership | | | | | | 4 | | | | | | 4 |
| Electronic Other Activity. PSAs, Electronic Ads, Crawls, Video Conf, Web Conf, Web Chat | | | | | 5 | | | | | | | 5 |
| Interactive Presentation to Public. Face to Face In-Person | 37 | 5 | 19 | 7 | 4 | 10 | 5 | 29 | 6 | 20 | 1 | 143 |
| Print Other Activity. Newspaper, Newsletter, Pamphlets, Fliers, Posters, Targeted Mailings | | 6 | 55 | 5 | 46 | | 1 | | 11 | | 3 | 127 |
| Radio Show. Live or Taped. Not a Public Service Announcement or Ad | 3 | | | | | | | | | | | 3 |
| TV or Cable Show. Live or Taped. Not a Public Service Announcement or Ad | | | | | | | | 2 | | | | 2 |
| (blank) | | | 9 | 2 | 30 | | 1 | 7 | 12 | 2 | | 63 |
| Grand Total | 58 | 12 | 93 | 19 | 85 | 19 | 10 | 40 | 30 | 31 | 7 | 404 |

d. Unmet Needs

| Year-Month | Appalachia | Central Midlands | LGOA | Lowcountry | Lower Savannah | Santee-Lynches | Trident | Upper Savannah | Vantage Point | Waccamaw | Grand Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2014-1 | 14 | 30 | 1 | | 2 | | 1 | | | 2 | 50 |
| 2014-2 | 24 | 11 | | | 9 | | 6 | | 1 | 1 | 52 |
| 2014-3 | 19 | 24 | | | 10 | 1 | 10 | 1 | | 6 | 71 |
| 2014-4 | 15 | 25 | | 1 | 34 | 6 | 25 | 2 | 4 | 9 | 121 |
| 2014-5 | 43 | 26 | 1 | 2 | 18 | 2 | 20 | 1 | 5 | 2 | 120 |
| 2014-6 | 33 | 22 | 5 | 1 | 41 | 2 | 23 | 4 | 2 | 3 | 136 |
| Grand Total | 148 | 138 | 7 | 4 | 114 | 11 | 85 | 8 | 12 | 23 | 550 |

Note: The following data is comprehensive of the Lieutenant Governor's Office on Aging (LGOA), as well as all ten (10) Area Agencies on aging (AAAs)/Aging and Disability Resource Centers (ADRCs) for the time period of January 2014 through June 2014; this information was pulled on 7/18/2014; any information inputted for this time period after this date will not be included.

**III. What's New**

In addition to overall program development, the LGOA I&R/A Program Manager and Program Coordinator continue to work to develop new helpful resources in terms of capturing, reviewing, and analyzing data via OLSA. The following items have been created to assist I&R/A Specialist in documenting data and monitoring performance goals.
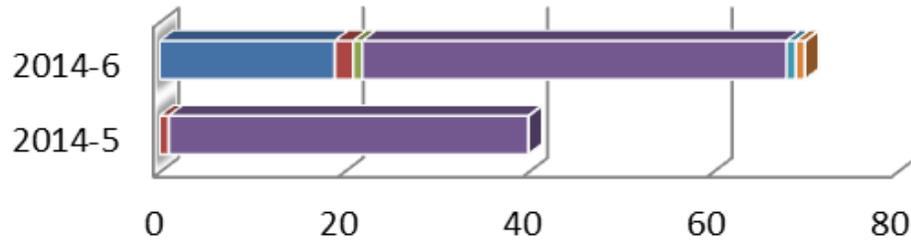
1. The I&R/A Quarterly Report

   The quarterly I&R/A report consists of three (3) focused areas of data information: contact volume, outreach efforts, and unmet needs. Each focus area is to be cross-referenced with GIS Mapping for planning and service areas, and depicted in both numerical portions and correlating visual aids (i.e. graphs, pivot tables, etc.). This report is designed to increase the measurable goals of the I&R/A program, establish monitoring practices, and afford each region's I&R/A Specialist the opportunity to provide feedback regarding their local program, as well as submit requests for any trainings from the LGOA as needed. This routine report will continue to increase accountability for the I&R/A Program at both the state and local levels.

2. The addition of the LIHEAP Component Code

   In May of 2014 the LGOA added a new component code entitled "LIHEAP" under the "All Calls" tab in OLSA. The LGOA has been asked by the General Assembly to provide regional data from the PSAs showing that seniors are receiving energy assistance through the Low Income Home Energy Assistance Program (LIHEAP).  If used correctly, this component code allows the LGOA to identify any calls in which LIHEAP was discussed, or a referral was made for assistance.

   Please see the next page for information regarding the use of the LIHEAP component code.

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# Record of LIHEAP via OLSA



| | 2014-5 | 2014-6 |
|---|---|---|
| ■ Central Midlands | | 19 |
| ■ LGOA | 1 | 2 |
| ■ Lowcountry | | 1 |
| ■ Trident | 39 | 46 |
| ■ Upper Savannah | | 1 |
| ■ Vantage Point | | 1 |

3. The release of the "I&R/A Quarterly Report Training: Extracting Data from OLSA" training

   This training module addresses each of the three (3) preset templates that are available to the I&R/A Specialist to assist in extracting the required data from OLSA for the means of producing the Quarterly I&R/A Report. This training can be found in the "SC Access Training" file of the Training Portal. Direct links to the training modules have also been posted to the I&R/A forum on the SC Access website.

Please note, any need for specific trainings and/or support for I&R/A Specialist identified during the previous quarters can be requested through the I&R/A Quarterly Report. The LGOA will review all requests for training and work collaboratively with the PSAs and AAAs/ADRCs to provide the proper resources where feasible. The LGOA will notify the AAAs/ADRCs via Single Point of Contact (SPOC) as additional tools become available.

## IV. Quarterly I&R/A Report Feedback

As of January of 2014, the LGOA requires each I&R/A Specialist to submit region specific I&R/A quarterly reports for the purpose of monitoring service activities via data recorded in OLSA. The goal of this report is to increase the measurable goals of the I&R/A Program and provide the opportunity to share localized insight regarding programmatic development.

Through each region's Quarterly I&R/A Report, it is evident that extensive actions plans are being put in place to enhance each region's I&R/A Program and address identified areas of need . The LGOA would like to commend each of the AAAs/ADRCs for taking the initiative to use their data as a resourceful tool and implementing progressive goals for the program, of which many have been achieved.

The LGOA would like to recognize the following accomplishments during the first two reporting periods by some regions as reported by the I&R/A Specialist:

- Design of an unmet needs keyword listing to make tracking unmet needs easier and more efficient;

- Utilization of census statistics for comparison of client data;

- Utilization of multimedia to provide community information and education;

- MOUs put in place to streamline referrals and provide better access to resources through fellow state agencies, such as community action agencies;

- Overall increased documentation of unmet needs; and

- Identification of the need for a follow-up implement to measure the helpfulness of the program with constituents.

The LGOA looks forward to continued feedback from each of the I&R/A Specialist in terms of developmental strategies and will continue to share trends exposed via the quarterly I&R/A reports.

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## V. I&R/A Program Analysis and Summary

After extensive review and analysis of the programmatic data above, the LGOA has pinpointed inconsistencies, as well as inaccuracies in relation to real world interactions and observations shared by our aging network, and the factual support provided via our database in regards to the needs of our senior population.  It is imperative that the I&R/A Program as a whole become consistent in the process of recording client intake information for reporting and advocating purposes.

## VI. Conclusion and Action Plan

Through the Quarterly I&R/A Reports, as well as the Statewide Semi-Annual I&R/A Program Report, the LGOA has identified the following areas as focus points in need of development to enhance overall improvement of service delivery through the aging network's I&R/A Program:

- defining, recording, and addressing unmet needs and service gaps to more accurately represent the needs of our target population;
- expansion of outreach techniques to reach a more widespread portion of the senior population;
- capture, review and analyze;
- heightened awareness of the AAAs/ADRCs presence and physical location, as well as of the programs and services provided through the aging network; and
- client intake and data input consistency.

The LGOA will continue to review and analyze data for monitoring purposes, while striving to provide supplemental resources to aid our aging network in the gradual climb of increased quality of services to our target population. As best practices and resources are developed, the LGOA will notify the AAAs/ADRCs via Single Point of contact (SPOC).