

# Engagement 2 Summary Report

## Online Tool Focus Groups

August 14, 2020

The logo for The Improve Group is displayed on a teal rectangular background. The text "The Improve Group" is written in white, with "The" in a regular weight, "Improve" in a bold weight, and "Group" in a regular weight.

The **Improve** Group

# Report purpose

The DHS/DEED Stakeholder Engagement for Interagency HCBS Shared Visioning is being conducted as iterative, ongoing, agile engagement. As a part of this approach, PIPEin and VIP members are being invited for several data collection opportunities to help improve products and services. This report summarizes findings from DHS/DEED’s second stakeholder activity, a virtual focus group on a new online tool held Thursday, August 6<sup>th</sup>, 2020.

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## Introduction

The DHS/DEED Stakeholder Engagement for Interagency HCBS Shared Visioning's second engagement was a virtual focus group (held in Zoom) about an online tool that can be used to store and share documents, create contact lists and teams, and complete and share activity results. The focus group was held on Thursday, August 6<sup>th</sup>, 2020 and led by The Improve Group (IG), a research and evaluation firm based in St. Paul, Minnesota. DHS and DEED sent an invitation to 189 PIPEin members from three different role categories to the focus group, and accepted registrations from the first 12 individuals from each role. A total of 29 individuals participated. Roles included Waiver Case Managers and Lead Agency Staff (abbreviated below as WCM/LAC), VRS/SSB staff, and Employment Service Providers (abbreviated below as ESPs). Participants were split into three different focus groups by role, and each group was led by a different IG facilitator who used the same focus group protocol.

IG analyzed focus group transcripts from each group; key findings and supporting evidence from this analysis is provided below. Due to the discussion-based nature of the focus groups, IG gathered opinions but did not quantify how many participants agreed with each idea discussed. Therefore, the findings are phrased as the group forwarding an opinion, but it should be noted that in most cases only a subset of participants of that group brought up and/or specifically stated agreement with the idea. A copy of the focus group protocol can be found in Appendix A.

## Focus Group Executive Summary

All three groups – Waiver Case Managers / Lead Agency Staff, VRS/SSB staff and Employment Service Providers – saw considerable benefits of the online tool discussed in the focus groups. They believed that the tool could streamline their work, creating efficiencies and preventing them from repeating certain processes. They also believed that the tool could be a more accurate and updated resource for things like contact and benefits information.

Focus group participants also highlighted some concerns they had about the tool. They stressed the need for information within the tool to be continuously updated to be useful. Others brought up concerns around accessibility, confidentiality of information, limited access to technology or internet, and extra time required to use the tool.

Participants also highlighted the need for training on the tool and offered some suggestions for how to structure the training. These suggestions ranged from offering trainings that accommodated different learning styles to establishing on-going supports in addition to a one-time training.

## Reading this report

To gather highlights and primary findings from the report, skim the section headers, bold findings statements and brief paragraphs under each. For detailed feedback, see the bullet points.

# Focus Group Findings

## Benefits of the tool

**The tool would streamline workflows, create efficiencies, and prevent professionals from having to repeat certain processes.**

All three groups agreed that the tool would result in an overall streamlining of work. Each group believed that this tool would prevent professionals from needing to ‘reinvent the wheel’ multiple times in their work.

- All three groups believed that the tool could reduce the amount of work, especially with filling out duplicate paperwork when someone transitions to a new worker or placement. VRS/SSB staff also maintained that the tool can prevent people from having to dig through piles of records, especially for people who haven’t been able to digitize materials.
- ESPs believed that the tool would sustain momentum and enable them to ‘hit the ground running’ when working with someone to find employment. From their perspective, this could also expedite the startup of services, as they don’t have to wait for someone to give them something they need.
- VRS/SSB staff mentioned that the streamlining would make the transition between services less exhausting for individuals and would reduce the burdens on individuals and their families.
- VRS/SSB staff and ESPs both mentioned that support professionals would not have to keep asking families for the same documentation. WCM/LAS also said that they would not need to collect information from people every time they need to make a referral and start with a new provider, potentially reducing the amount of lost information.
- WCM/LAS stated that the tool would prevent duplication that happens when needing to send materials to multiple agencies.
- WCM/LAS also believed the tool would create efficiencies by saving on multiple phone calls if everyone can see the status of paperwork, documents, etc.

**Updated contact lists would be useful and would help with communication.**

There was considerable consensus around the utility of contact lists to aid in communication across team members. Many believed that this is especially important given high turnover rates in the field. Having the ability to quickly look up members of someone’s team would make work more efficient for professionals.

- VRS/SSB staff mentioned that this would be useful when people move between counties or service providers, allowing staff in the new county to quickly see who they had worked with.
- All three groups said that the contact list would be one of the most useful features of the tool.

### **The tool was seen as more person-centered, and as a way to empower individuals by giving them ownership of the account.**

All three groups appreciated that the person is the driver of information because they own the account. They believed that the tool would empower people to share information and communicate with different providers as opposed to the providers doing the sharing and communicating.

- However, some ESPs believed that the tool was being designed with providers, VRS, and the county in mind. Similarly, WCM/LAS and believed that individuals should be brought in during the design phase, similar to the way this group is being consulted.

### **The tool was perceived to be a more accurate and updated storehouse for information.**

Participants in each group mentioned that the tool could be a way to ensure that an individual's information is accurate and updated. Many expressed optimism that the tool can be used to see an accurate picture of an individual's history, team, benefits, etc.

- WCM/LAS believed that it would be useful for people to be able to add their ideas to the account on an ongoing basis, i.e., someone can update their goals as they change. They also believed that it could capture and store information that might otherwise be lost.
- VRS/SSB staff mentioned that the tool could give service providers an accurate picture of employment supports and benefits an individual would be eligible to receive. Similarly, ESPs held that it can be hard to figure out someone's history without the tool because they do not always have a full job history in their records.
- WCM/LAS and VRS/SSB staff thought that the tool would be helpful by showing providers when activities (like resumes) are complete. They believed that, if possible to add, automated notifications could be particularly useful in ensuring that people are kept up-to-date.

## Concerns about the tool

### **Many stressed the importance of keeping information in the tool updated for it to be usable.**

Several people across groups mentioned that the tool will only be usable and beneficial if the information is continually updated as things change.

- WCM/LAC believed that it may be helpful to allow both individuals and case managers to be able to update the account, as client contact information can often change. They believed it was important to clarify the roles and responsibilities for updating information.

### **Participants emphasized that the tool needs to be accessible for people receiving services.**

All three groups mentioned that the accessibility needs must be taken into account in the development of the tool. If not accessible, many believed that it will be too difficult for individuals to use or navigate, resulting in a high need for support and assistance.

- VRS/SSB staff stated that it should not be assumed that people can read written text on a page, as this is often not the case for people receiving services.
- WCM/LAS brought up the challenges of remembering many passwords. While the account needs to be secure, memorizing multiple passwords will be a barrier.
- WCM/LAS and ESPs suggested that pictures or icons should be used, and that there should not be too many options per screen.
- ESPs requested that actual users of all ability levels test the tool in a pilot phase.
- There were concerns about the confidentiality of individuals' information that is stored in the account.

Many people expressed concern about the security measures that would be in place to protect an individual's private data. This raised several questions for participants about what consents and permissions might be needed in order to protect privacy and to prevent others from taking advantage of individuals.

- VRS/SSB staff brought up the fact that individuals might not want everyone to see and access their medical records.
- All three groups mentioned that it is important to ensure the individual that their account is secure.

**Some expressed concerns that using the tool would take extra time that professionals might not have.**

There was some concern across groups that the tool could add extra work for people who are already busy. In order for the tool to have value, participants believed that it cannot become a burdensome task that ends up being 'just one more thing' they have to do.

- All three groups mentioned that it would create extra work for people, including VR counselors and direct support staff. WCM/LAC believed that the extra time to assist people with uploading information into the tool would necessitate a team approach.
- ESPs mentioned that the tool would increase costs and therefore would require additional funding.
- ESPs mentioned that people may be required to enter the same information into multiple systems, including this tool. This might cause people to spend extra time or to forget to enter information in the tool, especially if they continue to use other systems and this is not their primary source of information.

**Many believed that technology, including access to the internet, computers, and scanners, could be a barrier inhibiting use of the tool.**

All three groups believed that the tool would pose challenges for people who lack access to a reliable internet connection or computers, particularly in rural areas and group homes.

- VRS/SSB staff and WCM/LAC believed that people would need to be able to share documents as printed material or email (as an alternative to sharing through the tool) if they were not comfortable with or did not have access to technology.
- The lack of computer access led several people across groups to request that the tool be accessible via mobile app to be used on a device like a smartphone or tablet.

## Considerations or suggestions for the tool

**Participants believed that the tool must be simple and user-friendly in order to be effective.**

All three groups mentioned that tool developers should focus on ease of use, which would result in more people using it. Some brought up previous experience with cumbersome tools or processes that felt unusable.

- VRS/SSB staff expressed some concerns of ‘overbuilding’ the tool, resulting in something overly complicated. One participant brought up DB101, which feels complicated and flooded with information.
- WCM/LAC suggested having a single interface to log in and an ability to link through the tool to other sites that are commonly used in the work without subsequent logins.

**Some highlighted a need to clarify roles and responsibilities in relation to the tool.**

Though it was clear that the person owns the account, some requested more information about who is responsible for entering in different pieces of information into the account.

- VRS/SSB staff sought clarity on who is responsible for putting documents in the account, the individual or the support professionals. They wondered how much information support professionals will be able to enter if the account is technically not their account.

**Participants across groups had ideas about several additional features or functionalities for the tool beyond what was described.**

All three groups mentioned many new ideas that could be added to the tool. These included:

- Syncing with Workforce One, since a lot of documents are there already (VRS/SSB staff, ESPs)
- Linking to other portals used, like HB101 (WCM/LAC)
- Adding in other support staff such as therapists, other team members outside of employment realm, AARMS (VRS/SSB staff)
- Adding the ability to capture billing information (i.e., hours to create resume, hours for in-person visits, etc.) (VRS/SSB staff)

- Storing information for references used in job applications (VRS/SSB staff)
- Including release of information and permission sections (WCM/LAC)
- Including links to resources related to employment (i.e., transportation, vendors, funding) (WCM/LAC)
- Including CSP and CSSP in documents (WCM/LAC)
- Allowing people to view their budgets (ESPs)
- Giving employers limited access (WCM/LAC)
- Giving people the option to opt-out of having an account if they prefer other systems (VRS/SSB staff)
- Enabling support professionals to see multiple people's information at once with a single login (ESPs)

## Suggestions for trainings

**Participants offered suggestions to make trainings about the tool the most effective.**

The need for training in order to increase uptake was highlighted across groups. Suggestions ranged from accommodating different learning styles to setting up systems to support people as they learn.

- VRS/SSB staff stressed the importance of considering different learning styles. Some people may want to explore independently and others need structured learning time.
- WCM/LAC suggested that interactive training in which participants practice using a system is better than lecture style.
- WCM/LAC suggested that training videos for primary account owners be made by other people receiving services for a peer-to-peer learning approach.
- People across groups requested that there be additional supports beyond a one-time training. ESPs mentioned that this could be having dedicated people who are responsible for answering questions or a manual they could reference. WCM/LAC also requested that there be clear information about who can be contacted for technical challenges.
- VRS/SSB staff believed that educating the 'whole network' about the purpose and importance of the tool is important and would create buy-in. They particularly wanted to hear in a training about how the tool will benefit people doing on-the-ground work. Similarly, WCM/LAC requested having a video that could simply explain how the tool can be beneficial.



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## Appendix A: Focus Group Protocol

# Engagement 2: The online tool Focus Group Protocol

### Introduction (15 minutes) 1:00 – 1:15

**To be read as people enter: Welcome everyone! Thanks for coming today. As you enter, please be sure your screen is displaying your first name and last initial so we can assign you to the correct discussion group per your role. Thanks!**

Hello! Thank you for your participation in today's focus group. My name is Amy Cyr and I am a Senior Consultant at The Improve Group. [Ellen and Russell introduce themselves]. The Improve Group is a St. Paul-based research and consulting firm, and we are facilitating a stakeholder engagement process with the DHS - Disability Services Division (DSD) and DEED - Vocational Rehabilitation Services (VRS) and State Services for the Blind (SSB) as they work to align their systems and provide employment services in a more coordinated way. We're joined today by Beth Grube from DHS Disability Services Division to gather your input on a new tool. [Beth introduces herself.]

Your input is critical in this system alignment and redesign. DHS and DEED plan to use information gathered from stakeholders, including information that we gather today, to guide their planning and design process. During today's focus group, we will be getting your input and perspective on a new online tool.

Today's focus group will be divided into two sections:

- First, we will tell you about the online tool that we'll be discussing, and Beth will be available to provide any needed clarification
- Second, we will move into three separate discussion groups to talk about the tool as it relates to your role – VRS/SSB staff; waiver case managers and lead agency staff; or employment service providers. We will be asking the same questions in each breakout group and will report your input back to DHS and DEED by role so they can better understand any differences in viewpoints according to roles and type of work. Beth will not be in these small group discussions, but she'll be available to pop into each room if anyone has a question for her. So if you're unable to answer a discussion question because you need some clarification from Beth, let your facilitator know and we'll bring her into your room to

answer your question. She'll not stay in your discussion room after she's answered your question.

DHS and DEED will post key findings from this and all engagements in regular updates on the Hub website in a section dedicated to this work.

We will take notes during the discussions, and we will also record the discussions in case we miss any detail in our notes. The Improve Group staff will access the recordings only if we need more detail than we were able to capture in our notes, and these recordings will not be heard by DHS or DEED staff. If you want to offer any input that you prefer remain anonymous, please type your comments in a private chat to your discussion facilitator or email Russell at (place email in chat) and we will pass on the information anonymously to DHS and DEED. Please raise your hand or give a 'thumbs up' by clicking on the Expressions button at the bottom of your screen if you are okay with us recording. Thank you.

Because we will be collecting many opinions, DHS and DEED can't promise that they will make changes based on every comment collected, but they will use our analysis of all the input you provide to help guide them as they move forward. The focus group will last 90 minutes and we will end at 2:30 pm.

Before we describe the online tool we'll be discussing, what questions do you have about the focus group logistics?

## About the online tool

The types of input we'll ask you about the online tool are things like how might having an online tool change how you share information or make referrals, and what tool features would be most helpful for your work. We're not going to get into *all* the details about how the tool might work, but rather are looking for your feedback on things like features. So we'll provide a *general* description of the tool now, and allow for a few *general* clarification questions if there's anything else you need clarified about the tool to do the discussion. But a reminder that we don't need to get into all the details about the tool for the purpose of today's focus group.

So about the tool: People receiving services would own their own account in the online tool and could receive help from support professionals, family, or friends as needed to set up and maintain their accounts. People could use the tool to complete exploration profile activities like a personal profile and resume to plan for their future, they could access their own benefit information, and safely store, access and share activity results and documents with their team, including case managers, VR counselors, family and friends. The tool could help people create contacts lists and teams, and communicate their information to team members easily without having to repeat it for each person. For example, a person could share the VR employment plan with their case manager and family. The tool could help a person keep everyone updated on progress and ensure all team members have the information needed to help the person move forward. Support professionals

could also have accounts that give them the ability to use certain functions. These accounts would enable people receiving services and professionals to take advantage of the many features of the online tool. Note that for our discussion today, we will simply be referring to the online tool as 'the tool.'

Now, before we break into our discussion groups, is there anything else that you need clarified about the tool in order to talk about its basic features and how you might use it? We have just a minute or two for any needed clarification.

[Questions & Beth answers]

Great, we will now move into three breakout groups based on your role. Just click on the button when it pops up on your screen.

*[Begin breakout groups]*

## Warm-Up (5 mins) 1:15 – 1:20

As a reminder, please leave your microphone muted if you are not speaking. Thank you!

### **1. To open our discussion together, let's each introduce ourselves with:**

- a. Your name
- b. Your agency or organization
- c. Your role
- d. One sentence about the most rewarding thing about the work you do

**I'll call on each person to go next.**

Great! Thank you for the introductions. Let's start our discussion about the online tool by describing the tool and asking you some questions about it.

## Usefulness of online tool and its features (40 mins) 1:20 – 2:00

1. As we noted, people receiving services would own their accounts in the tool and receive support setting up and maintaining their accounts from service professionals, family or friends, as needed. The tool would have several features: connecting people to activities like creating a personal profile and resume or getting benefit information; storing documents like Individual Education Plans, support plans, or employment plans; creating contact lists and teams; and securely sharing documents and activity results with others. The tool could be used across agencies to support communication, transitions between waiver and VRS/SSB services, and referrals. (Display this list of features for participants to read.)

- a. How might this tool change the ways that you currently communicate information to and from other support professionals and entities about people you support (benefits information, activity results, etc.)?
  - b. How might this tool change the ways that you currently handle referrals, if at all?
  - c. In what ways, if any, would an online tool improve or add value to the existing methods you use to accomplish these tasks?
  - d. Thinking about your role and your own use of the tool, which of the tool's features (helping people complete planning activities and get benefits information, storing activity results and documents, creating contact lists and teams, or sharing information with others) would be the *most* useful to you, and why?
2. What could DHS and DEED do to ensure that the tool's features would be the most usable for you in your role?
    - a. What could DHS and DEED do to ensure that the tool creates efficiencies in your work?
  3. Thinking about the planned features of the tool that we just discussed (reference visual list and read each: helping people complete planning activities and get benefits information, storing activity results and documents, creating contact lists and teams, or sharing information with others) what additional functionalities or features, if any, would be beneficial for you or people receiving services?

## Using the online tool in your daily work (25 mins)

### 2:00 – 2:25

1. With the current knowledge you have of the tool:
  - a. What barriers would prevent *you or others in your role* from using the tool in your daily work, and how could those barriers be removed?
  - b. What barriers would prevent *people receiving services* from using the tool, and how could those barriers be removed?
2. Aside from the basics of how to use the tool, what additional things would you want included in a training to enable *you or others in your role* to begin using the tool?
3. What training, information or support would *people receiving services* need around using the tool?

4. What concerns would you have about integrating and using the tool in your daily work?
  - a. What support could DHS and DEED provide to help alleviate some of these concerns?

## Wrap-up (5 mins) 2:25 – 2:30

Thank you again for your participation in today's focus group. Before we end this focus group, is there anything else that you would like to share about your perceptions of the online tool and how it can be used to enhance the experience of providers and those receiving services?

The Improve Group will report learnings from this focus group to Beth and her colleagues at DHS and DEED. If they have any follow-up questions based on the information you provided, we will send follow up questions by email to this group and any who wish to provide more input can do so at that time.

Thank you!