



Agenda Item Number

8a.

Aging & Disability Resource Connection (ADRC) Secret Shopper Results Fall/Winter 2023

Date: April 25, 2024

Presenter: Stephanie Sheelar

Action Recommended: None. Information Only.

Background: One goal of the Lane Council of Governments Senior & Disability Services' (LCOG S&DS) Area Plan for the ADRC is to administer high quality and accurate information and assistance, and to provide consumers with a person-centered, holistic service approach when contacting the ADRC. To ensure the LCOG S&DS ADRC meets this goal, the LCOG S&DS Advisory Council members conducted a secret shopper survey from October 17, 2023, through December 15, 2023.

Prior to the launch of the survey, seven Advisory Council members were provided training on the intent of the project, as well as steps to completing the survey. Each volunteer was provided with 3-4 scenarios that contained a name, reference, phone number, zip code, age, gender, pronouns, sexual orientation, race, resource need, and consumer concern. The intent of these scenarios was to provide a suggested context for the call. Advisory Council members called to interact with ADRC Specialist staff and then completed a survey including a review of the specialist's customer service and the resources they were provided.

Results

Of the 21 scenarios with surveys disbursed to volunteers, 14 were returned to the Contracts Manager. Of the 14 survey responses received, 13 provided complete information.

The 14 surveys:

- 3 (3 total calls) answered on first call attempt (21%)

- 10 (20 total calls) answered on second call attempt (71%)
- 1 (2 total calls) scenarios never reached an ADRC specialist (8%)

The 13 complete surveys:

- 10 (77%) of 13 scenario calls were answered “Aging and Disability Resource Connection.”
- 13 (100%) of 13 scenarios, the specialist asked how they could be of help.
- 4 (31%) of 13 scenarios, the specialist provided their name to the caller.
- 12 (92%) of 13 scenarios, the secret shopper’s concerns/requests were clearly acknowledged.
- 7 (54%) of 13 scenarios, the ADRC specialist paraphrased the request for services for clarification/confirmation.
- 1 of 13 calls placed on hold.
- 13 (100%) of 13 calls, the specialist used a tone appropriate to the nature of the request.
- 13 (100%) of 13 calls, the specialist provided a referral appropriate to the scenario.
- 11 (85%) of 13 calls, the specialist provided all pertinent information about the referral.
- 5 (38%) of 13 calls, the specialist asked for geographic region/zip code.
- 4 (31%) of 13 calls, the specialist asked for demographic data.
- 0 (0%) of 13 calls, the specialist offered an appointment.
- 8 (62%) of 13 calls, the specialist offered further assistance.
- 12 (92%) of 13 calls, the specialists closed the call in a friendly manner.
- 8 (57%) of 13 calls, the call was logged in GetCare by the ADRC Specialist

Information provided to LCOG S&DS by the Advisory Council members who participated in this process revealed the following feedback regarding low participation in the secret shopper project:

- Scenarios were returned, as volunteers felt uncomfortable pretending to be someone else or did not have the understanding of the pronouns provided on the scenario.
- The time commitment for those with day jobs.

- Being put on hold by the ADRC for a long period of time (4+minutes) and then the call being dropped.
- Unplanned family emergencies during the monitoring period.
- Additional meetings to review the secret shopper call project produced the following recommendations:
- It would be nice to have more volunteers for this project to be able to be able to conduct more scenarios with the ADRC to get a larger pool of information.
- Provide additional information to the volunteers on the Race, Ethnicity, Age, Language, and Demographic data (REALD) in the scenarios.
- Provide additional training to ADRC Specialists on the Race, Ethnicity, Age, Language, and Demographic data (REALD). Gathering REALD data information is a requirement by ODHS.
- Easier to call when calling about somebody else – it may make others more comfortable to switch this scenario around. Offer opportunity to personalize scenarios.
- Now that we have piloted this process, during the next secret shopper survey, at the end of the call we find it beneficial to have volunteers disclose that it was a shopper call.
- Regular check ins with secret shopper volunteers, not only through email.
- In one scenario, the ADRC Specialist provided a website as a resource. The volunteer expressed concern that not everyone owns a computer. ADRC Specialists should be mindful of technology barriers and provide alternate accessibility methods.
- In one scenario, the ADRC Specialist directed the caller to “look near the elevator of the facility” for an Ombudsman poster and did not provide alternate resources. If the name of a facility was not given, how does the ADRC Specialist know there is an elevator or where

the poster is located? ADRC Specialists should be mindful not to make assumptions about callers' environments.

The ADRC Unit Manager and the Program Manager reviewed this data and feedback and have implemented changes that have focused on increasing the consistency of the work of this Unit as well as the customer service provided during a call. This has resulted in changes to call expectations and additional trainings for the ADRC Unit around the State requirements for narration and call basics.