# Using Data for Program Improvement

With 2017 Annual Performance Report (APR) data now available at [www.catada.info](file:///C:\Users\klaurin\Documents\Data%20Reporting%20and%20Tracking\www.catada.info), state and territory AT programs can begin to analyze their performance with an eye towards identifying possible areas for program improvement and/or changes to the State Plan for Assistive Technology (SPAT). You can run the following activity reports (<http://www.catada.info/content/data>):

* Your state, single activity, single year
* Your state, single activity, multiple years (trend data 2015, 2016, 2017)
* Your state, single activity, compared with national data (and/or compared with a demographically similar state)

Tutorials to facilitate using the CATADA site are available at <http://www.catada.info/website-tutorial>.

This document provides suggestions of ways to explore data for key access and acquisition activities, which may form a useful basis of discussion for state plan development with staff and AT advisory council members.

## State Financing - Financial Loans

As a state plan is developed, the type(s) of state financing activities is one area to consider. A description of state financing activities can be found at: <https://www.at3center.net/repository/statefinancing>. Review the required data collection elements and performance measures for state financing at: <http://www.catada.info/materials> at the link for “State Grant for AT Annual Progress Report”.

### Financial Loan Numbers and Overall Dollar Amount over Time:

Is your total number or dollar amount of approved financial loans changing from recent years? You can also compare your state’s overall number of loans or total dollar amount of loans (e.g. increase or decrease) with the national trend data.

Ask: How can we explain the increase/decrease? e.g., what accounts for a significant change in the number of applications submitted or rejected? Was there a change in criteria for approval, loan terms or interest rates? Did we take on new partners or change our outreach strategy? Does our program account for a reasonable proportion of the national total dollar amount, and if not, do we understand why?

Decide: Do we want to increase the overall numbers of financial loans? The existing fund balance from which to make loans and administer the program is one important area to consider when making this decision, along with the perception of met and unmet needs for the state/territory. For our type of financial loan program, are loan payments, interest and other income sources adequate to sustain the program?

### Financial Loan and Device Type:

While nationally the dollar value of loans issued by financial loan programs overwhelmingly is for modified vehicles and vehicle modifications (72%), the dollar value and the number of loans by device type can vary significantly from state to state. You can generate a report that compares this activity by year (e.g. FFY 2015, 2016, 2017), exploring both the % and dollar amount by device category. You can also compare your state’s activity to national data.

Ask: Does the distribution of financial loans by device type and dollar amount loaned make sense in light of our loan program structure? Is our data substantially different from the national data and why? Can we explain changes over time, and differences among the device categories? What are the implications for making changes in our loan terms (e.g. minimum and maximum loan dollar amount) for certain device categories?

Decide: Do we need to look at changing the parameters of our program, e.g. the allowable age or mileage when financing a used adapted vehicle or the total amount that can be borrowed for secured loans like home modifications, to increase loans for a specific device type? Do we need to increase our outreach to one or more groups or to a specific type of AT vendor or service provider (audiologists, vehicle modification dealers, disability-specific organizations, state agencies, SLPs, OTs, PTs, etc.) so that our program is used to provide access to a broader range of devices and services?

### Financial Loan Satisfaction

Are financial loan participants satisfied? You will want to be sure you are asking about satisfaction with your service, not the degree to which participants are satisfied with the acquired device(s) or service(s). Be sure you are obtaining satisfaction data from as many financial loan recipients as possible.

Ask: If satisfaction has increased dramatically (e.g. from 60% “highly satisfied” to 90% “highly satisfied”) what factors account for that trend? Or conversely, has there been a decline in satisfaction? Are we asking the satisfaction questions the “right way”? Is satisfaction data for our program in alignment with national trends?

Decide: Do we need to get more information from participants about their satisfaction with our services? For example, if our satisfaction ratings are significantly better than the national percentages, what might explain that and are there things we are doing that can be replicated by other programs? How can we discover why some consumers are only “somewhat satisfied” and learn what it would take for them to become “highly satisfied”?

## State Financing - Other Activities that Directly Provide AT and/or Create AT Savings

The development of a new State Plan is a good opportunity to examine your performance of “Other State Financing” activities and explore opportunities to add new ones in this category. If you currently operate an “Other” type of state financing activity (e.g. administering a last resort fund or running a telecommunications equipment distribution activity), review the required data collection elements and performance measures for state financing at <http://www.catada.info/materials> at the link for “State Grant for AT Annual Progress Report”. The categorization of devices should be reviewed in accordance with the classification decision rules and instructions for the APR, especially if you are administering a telecommunications equipment distribution program.

Other State Financing Numbers over Time

For the particular “Other” state financing activity or activities that you operate, did the number of devices provided change over time either by total number provided or by device type? Has the total dollar amount of devices provided changed over time either by total dollar amount or by device type? You can generate a report that compares this activity by year (e.g. FFY 2015, 2016, and 2017).

Ask: How can we explain the increase/decrease? e.g., did the number of applications that the program received change from previous years?

Decide: Do we want to increase the number or dollar amount of devices and services provided through the program?

Ask: Do we need to increase our outreach to one or more groups or to a specific type of AT vendors or service providers to (audiologists, vehicle modification dealers, disability-specific organizations, state agencies, SLPs, OTs, PTs, etc.)?

### Other State Financing and Device Type:

For some “Other” state financing programs, the type of devices provided may be limited by eligibility for the program and the type or purpose of the equipment the program is authorized to provide. Comparisons with national data are not as helpful with other State Level activities since the types of “Other State Financing” activities vary considerably from state to state.

Ask: Are consumers able to acquire a range of assistive devices through our “Other” state financing program?

Decide: Do we need to look at changing the parameters of our program?

### Other State Financing Satisfaction

Are Other State Financing participants satisfied? You will want to be sure you are asking about satisfaction with your service, not the degree to which participants are satisfied with the acquired device(s) or service(s).

Ask: If satisfaction has increased dramatically (e.g. from 60% “highly satisfied” to 90% “highly satisfied”) what factors account for that trend? Or conversely, have we seen a decline in satisfaction? Are we asking the satisfaction questions the “right way”? Is satisfaction data for our program in alignment with national trends?

Decide: Do we need to get more information from participants about their satisfaction with our services? Can we discover why some consumers are only “somewhat satisfied” and learn what it would take for them to become “highly satisfied”?

## Device Demonstration

Definitions (found in [State Plan and Instructions 2018-20](http://www.catada.info/sites/catada.info/files/files/State%20Plan%20for%20AT%20and%20Instructions%202018%20-%202020%5B1%5D.pdf) and [Instruction Manual for the State AT APR OMB Approved Dec 2017](http://www.catada.info/sites/catada.info/files/files/Instruction%20Manual%20for%20the%20State%20AT%20APR%20OMB%20Approved%20Dec%202017.pdf) at <http://www.catada.info/materials>) should be reviewed with staff and subcontractors to insure fidelity in your data collection. In particular, the definition of demonstration should be reviewed and contrasted with “public awareness” activities, and the categorization of devices should be reviewed in accordance with the classification decision rules and instructions for the APR. Review instructions about counting the number of participants, as there are likely to be more than one (e.g. person with a disability plus her parents and/or IEP team members) in each demonstration (even though only one outcome/decision will be reported per demonstration). Additional information regarding definitions is available at <https://www.at3center.net/repository/devicedemonstration>

Numbers of Device Demonstrations over Time:

Is the total number of demonstrations changing over time? You can generate a report that compares this activity by year (e.g. FFY 2015, 2016, and 2017). You can also compare your state’s trend (e.g. increase or decrease) with the national trend data.

Ask: How can we explain the increase/decrease and was the change intentional? e.g., we changed subcontractors due to poor performance in 2016, and saw the increase in 2017; we changed subcontractors and our new subcontractor had staff with greater competencies for conducting demonstrations with a variety of devices; due to an aging inventory, there is less consumer interest in demonstrations; we had a vacancy of several months with the position responsible for device demonstration. Is the change (e.g. decrease) similar to that in the national trend data?

Decide: Do we want to increase the overall numbers of demonstrations and if so, will that take additional resources? Do we need to increase outreach to let people know about the availability of device demonstrations, or change how, where, or when they are offered?

### Demonstration and Device Type:

How well do your demonstrations represent the full taxonomy of AT devices? You can generate a report that compares this activity by year, exploring the % of demonstrations by device category. You can also compare your state’s activity by device type with national data.

Ask: Why do we have so many demonstrations in some of the categories, and so few in the others? Is our data different than the national data, and if so, why? For example, nationally, 15% of demonstrations are in the category of environmental adaptations, yet in our state that category accounts for less than 1%. How can we explain changes over time, and differences among the device categories? What are the implications for building staff competencies and/or adding to our inventory?

Decide: Do we need to expand our inventory in one or more areas and if so, what will we need to do if this requires additional funding? Do staff need to increase their professional development with one or more categories of devices (refer to core competencies information at <https://www.at3center.net/repository/devicedemonstration>)?

### Demonstration Participants:

Are you reaching the “targeted” populations described in the AT Act?

Ask: Can we explain the distribution of participants? For example, does the AT program’s location in the state VR agency explain why there are so many “representatives of employment” and far fewer “representatives of education”? How does the distribution by role in our state compare with percentages by role nationally? Has there been a shift in distribution of participants over the last three years and if so, how can we explain that? If the number of demonstration participants is equal to but not greater than the number of demonstration events, does that mean we are somehow discouraging participants from bringing friends, allies, other team members, etc.? Or are we not counting this data correctly?

Decide: Do we need to increase our outreach to one or more groups (which ones?), to increase their participation in device demonstrations? Will this entail changing how we schedule device demonstrations or where we hold them?

### Demonstration Satisfaction

Are demonstration participants satisfied with the demonstration? You will want to be sure you are asking about satisfaction with your service, not the degree to which participants are satisfied with the demonstrated device(s).

Ask: If satisfaction is declining over time (e.g. movement from “highly satisfied” to “satisfied”), what factors might account for that trend? Are we asking the satisfaction questions the “right way”? Are satisfaction data for our program in alignment with national trends?

Decide: If necessary, how can we get more information from participants about the reasons they are less than “highly satisfied”? What would it take for them to become “highly satisfied”?

## Device Lending

This is an opportunity to review definitions with staff and subcontractors to insure fidelity in your data collection. In particular, the categorization of devices should be reviewed in accordance with the device classification instructions in the APR; additional information about device lending is available at <https://www.at3center.net/repository/deviceloan>

Review instructions regarding the purpose of the short-term device loan, and how to count device loans (e.g. when multiple devices are loaned at the same time to a single borrower).

Device Loan Numbers over Time:

Is your total number of device loans changing over time? You can generate a report that compares this activity by year (e.g. FFY 2015, 2016, and 2017). You can also compare your state’s trend (e.g. increase or decrease) with the national trend data.

Ask: How can we explain the increase/decrease? e.g., due to an aging inventory, there is less consumer interest in device loans; due to leveraged funding we were able to substantially update our inventory; we started featuring devices for loan on social media. Is the change (increase or decrease) similar to that in the national trend data?

Decide: Do we want to increase the overall numbers of device loans? Do we need to do more outreach or use different strategies to let people know about the availability of device loans (especially any new products)? Are there implications for inventory purchases?

### Purpose of Device Loan

Devices may be borrowed to assist in decision-making (requiring the collection of performance measures), to serve as a loaner (e.g. while the consumer waits for device repair or permanent funding), to provide an accommodation (e.g. providing a video magnifier at a conference registration table), or for training (e.g. for students to borrow in a graduate class on AAC, or for staff development).

Ask: Is the distribution of percentages by purpose of device loan similar to or different from the national snapshot? Has there been a substantial shift in purpose of device loan over time (e.g. comparing the program data from FFY15, 16, and 17 reveals a significant move from decision-making to accommodation); if so, how can that be explained (and is it a good thing)?

Decide: Do you need to change the focus of the purpose of device loans? How will you achieve this?

### Device Loans and Device Type:

How well do your device loans represent the full taxonomy of AT devices? You can generate a report that compares this activity by year, exploring the % of device loans by device category. You can also compare your state’s activity by device type with national data.

Ask: Why do we have so many device loans in some of the categories, and so few in the others? Does this reflect consumer demand in our state? Is our data different than the national data and why? How can we explain changes over time, and differences among the device categories? What are the implications for adding to our inventory?

Decide: Do we need to expand our inventory in one or more areas?

### Device Loan Participants:

Are you reaching the “targeted” populations described in the AT Act?

Ask: How can we explain the distribution of borrowers/device loan participants? For example, does the fact that the AT program’s regional centers are primarily centers for independent living explain why most borrowers are people with disabilities and very few borrowers are from other targeted groups? Is this distribution desirable? How does the distribution of borrowers by role in our state compare with percentages by role nationally? Has there been a shift in distribution of device loan participants over the last three years and if so, how can we explain that?

Decide: Do we need to increase our outreach to one or more groups (which ones?), to increase their participation in device lending? Will a focus on specific targeted populations influence the selection of devices we should add to the lending inventory?

### Device Loan Satisfaction

Are device loan participants satisfied with the device loan? You will want to be sure you are asking about satisfaction with your service, not the degree to which participants are satisfied with the borrowed device(s).

Ask: If satisfaction has increased dramatically (e.g. from 60% “highly satisfied” to 90% “highly satisfied”) what factors account for that trend? Or conversely, have we seen a decline in satisfaction? Are we asking the satisfaction questions the “right way”? Are satisfaction data for our program in alignment with national trends?

Decide: Do we need to get more information from participants about their satisfaction with our services? For example, if our satisfaction ratings are significantly better than the national percentages, what might explain that and are there things we are doing that are replicable by other programs? Can we discover why some consumers are only “somewhat satisfied” and learn what it would take for them to become “highly satisfied”?

## Device Reuse

Developing the new state plan is an opportunity to review definitions (found in the instructions documents at <http://www.catada.info/materials>) with staff and subcontractors to insure fidelity in your data collection and reporting. In particular, the definitions of device refurbishment and reassignment and/or open ended loan, as well as the categorization of devices, should be reviewed. If you operate an exchange program as well as a refurbishment/reassignment/open-ended loan program, consider whether or not you exclude device recipients from performance measures. Review instructions about counting the number of recipients and devices, especially when recipients acquire more than one item through the reuse program. Additional information about reuse definitions and data collection is available at <https://www.at3center.net/repository/devicereuse>

Numbers of Reused Devices over Time:

Is your total number of reused devices provided changing over time? You can generate a report that compares this activity by year (e.g. FFY 2015, 2016, and 2017). You can also compare your state’s trend (e.g. increase or decrease) with the national trend data.

Ask: How can we explain the increase/decrease in numbers of devices provided through device reuse? e.g., we had an equipment drive this year; we added two subcontractors; we lost a reuse partner; we discontinued our device exchange. Is the change (increase or decrease) similar in degree and direction to that in the national trend data?

Decide: Do we want to increase the overall number of devices provided to consumers through our reuse activities? What changes in resource allocation or program operations would we need to accomplish this?

### Device Reuse and Device Type:

Are you able to provide reused devices representing the full taxonomy of AT devices? You can generate a report that compares this activity by year, exploring the % of reused devices by device category. You can also compare your state’s activity by device type with national data.

Ask: Why does our reuse program have so many devices in some of the categories, and so few in the others? Is our data substantially different than the national data? For example, nationally, 10% of reused devices are in the category of environmental adaptations, yet in our state that category accounts for more than 25%. How can we explain changes over time, and differences among the device categories? Are we having difficulty obtaining sufficient inventories of devices that are in demand?

Decide: Do we need to expand our inventory in one or more device type areas? How can we do this?

### Dollar Amount Program Saved Consumers

Review the instructions for calculating the estimated value of devices that were refurbished and/or repaired and reassigned or placed on open-ended loan (page 25, [Instruction Manual for the State AT APR OMB Approved Dec 2017](http://www.catada.info/sites/catada.info/files/files/Instruction%20Manual%20for%20the%20State%20AT%20APR%20OMB%20Approved%20Dec%202017.pdf) available at <http://www.catada.info/materials>).

Ask: Are we seeing an increase or decrease in the dollar amount saved by consumers? Can we explain unexpected findings, e.g. even though there were fewer reused devices provided, there was a greater savings to consumers. Can we identify the kinds of devices that provide the greatest savings for consumers? Does data related to dollar amount the program saved consumers have implications for our program?

Decide: Should we change our focus on devices for reuse in order to increase the dollar amount the program saved consumers?

### Reuse Satisfaction

Are recipients of reused devices satisfied with the program? You will want to be sure you are asking about satisfaction with your service, not the degree to which participants are satisfied with the reused device(s). Note this is the only data report available through CATADA that provides insight into the number of people served by reuse (versus the number of devices).

Ask: Based on the numbers of individuals reporting satisfaction, are you serving more or fewer consumers than in prior years? If satisfaction is declining over time (e.g. movement from “highly satisfied” to “satisfied”), what factors might account for that trend? Are we asking the satisfaction questions the “right way”? Are satisfaction data for our program in alignment with national trends?

Decide: If necessary, how can we get more information from participants about the reasons why they are less than “highly satisfied”? What would it take for them to become “highly satisfied”?

## Training

Developing the new state plan is an opportunity to review definitions (found in the instructions document at <http://www.catada.info/materials>) with staff and subcontractors to insure fidelity in your data collection and reporting. Additional information on distinguishing training from public awareness and technical assistance as well as information regarding the classification of training topics (especially what “counts” as ICT training) is available at <https://www.at3center.net/repository/training>. Although there is no specific reporting requirement for transition, if you choose to meet the transition requirement through training (rather than technical assistance) consider whether you are, in fact, providing training to assist students with disabilities who receive transition services under IDEA (either transition from Part C to Part B or transition from school to post-secondary or employment) and adults with disabilities maintaining or transitioning to community living.

### Training Participants:

Are you reaching the “targeted” populations described in the AT Act? You can generate a report that compares this activity by year (e.g. FFY 2015, 2016, and 2017). You can also compare your state’s trends (e.g. increase or decrease in overall number or type of training participant) with the national trend data.

Ask: How can we explain the distribution of training participants by role (e.g. individuals with disabilities; representatives of employment)? For example, does the fact that the AT program is housed in a university and frequently provides guest lectures to university students explain why so many participants are “representatives of education” and very few are from other targeted groups? Is this distribution desirable? Are we reaching representatives of technology, a target audience for Information and Communication Technology (ICT) training? Do the training participants reflect those benefiting from the required transition training (or are we meeting that requirement through technical assistance)? How does the distribution of training participants by role in our state compare with percentages by role nationally? Has there been a shift in distribution of training participants over the last three years and if so, how can we explain that? Overall, what is trending in terms of the number of training participants?

Decide: Do we need to change or increase outreach to one or more targeted groups to increase their participation in training, and if so, which ones and why? Can we accomplish this through improved coordination and collaboration with targeted public and private entities? Do we need to develop a new strategy to reach training participants who should be the focus of ICT or transition training?

### Trainings by Topic

Ask: How does the distribution of training topics compare with national percentages? Does our program look very different from the national picture, and if so, why? Has there been a shift in the distribution of training topics over the last three years and if so, how can we explain the trend (e.g. the staff person who conducted training on funding and policy retired last year)?

Decide: Do we need to focus our training on different topics? What does that mean in terms of staff (or subcontractor or partner entity) capacity? Do we need to develop a new strategy to meet the ICT and transition requirements?

## Information and Assistance

Information and Assistance (I&A) is conducted to provide consumers with accurate, timely, and complete responses to their requests for information about assistive technology devices and services (including providers), funding for AT, as well as the AT services offered by the state AT program.  I&A may take just a few minutes (e.g. emailing a parent information about including AT in the IEP) or an hour or two of intensive assistance to individuals about AT products (e.g. helping a consumer set up pictures and frequently dialed phone numbers in a photo phone they had purchased). In particular, care should be taken to classify intensive assistance of this nature as I&A, not “training”. I&A may be provided in person, over the telephone, via email, or by other means. Because I&A usually entails a personal contact, state programs should be able to identify the category of the caller (e.g. person with a disability; representative of education) and the general type of information provided (e.g. related to devices or to services). I&A is the only component of public awareness for which meaningful data is available for generating reports through CATADA.

### I&A Participants

Are you reaching the “targeted” populations described in the AT Act? You can generate a report that compares this activity by year (e.g. FFY 2015, 2016, and 2017). You can also compare your state’s trends (e.g. increase or decrease in overall number of individuals requesting I&A) with the national trend data, or with a state that is demographically similar.

Ask: How can we explain the distribution of individuals receiving I&A, either for devices and services or funding? Is this distribution desirable? How does the distribution of recipients of I&A by role in our state compare with percentages by role nationally? For example, how can we explain the fact that in our state, 70% of those receiving I&A on AT funding are family members, while nationally it is only 25%? Are our overall I&A numbers low, compared with similar states, and how is that explained (e.g. our subcontractors may be under-reporting or misclassifying I&A). Has there been an increase or decrease in the overall number and/or distribution of I&A recipients over the last three years and if so, how can we explain that? Does the distribution of individuals receiving I&A look similar to – or different from – the targeted populations benefiting from state level activities?

Decide: Do we need to increase our outreach to one or more groups (which ones?), to familiarize them with our services, including I&A? Can we accomplish this through improved coordination and collaboration with targeted public and private entities (e.g. through a formal written agreement and/or contractual arrangement)?

### I&A Topics

Are you providing I&A on topics related to both AT devices and services as well as AT funding?

Ask: How do the number and distribution of individuals receiving I&A for devices and services compare with the distribution of individuals receiving information on funding? How does the distribution by topic compare with percentages by topic nationally? How can we explain any disparity, e.g. 95% of inquiries are related to devices? Are there implications for staff development (e.g. need for improved capacity related to AT funding)?

Decide: Do we need to increase or change our activities so we are seen as a resource for information on devices, services and funding? For example, conducting more training about funding for AT may increase the number of inquiries we receive on this topic.

*This document is part of a series of administrative guidance documents developed and produced by the* [*Assistive Technology Act Technical Assistance and Training (AT3) Center*](https://www.at3center.net/) *funded by Grant #90ATTA0001-01-00 from the Administration for Community Living (ACL). Any opinions reflected herein are solely the responsibility of the authors and do not necessarily represent the official views of ACL. July 2018 V1*