

# Conducting a Successful Older Adult Survey

**Long-Term Care Facilities  
Minnesota**

# Planning

Select population: long-term care facilities

Estimate sample size: MN shooting for 1100-1300

Calculate number of facilities needed

Sampling: stratifying variables and cut-offs

Select indicators and questionnaire items

Advisory Group and work with Kathy Phipps.

# Planning

**Plan Timeline:** hiring, training, recruiting facilities, piloting, pace of facility visits, post-project debrief

**Estimate staffing:** hire a coordinator first, then assemble a team of dental hygienists and data recorders

**Secure budget:** grant from Delta Dental of Minnesota Foundation, additional funding from CDC for surveillance activities under infrastructure grant

**IRB Approval:** exempt, this is surveillance and not research



# Planning

Develop documents, communications, forms, and processes!

- Recruitment letter, Fax-back form, One-pager
- Follow-up call script
- Confirmation letter
- Resident letter
- Family/guardian letters and consent forms
- Facility tracking database
- Consent / check-in forms
- Data collection forms (Epi Info/paper)
- Thank you letters
- Daily facility (contacts and travel details)
- Daily supplies checklist
- Process evaluation form

# Hiring and Training

- **Budget lots of time! Advertise widely.**
- **Be very specific in interview about nature of work, schedule, travel, and ergonomics.**
- **Think about in-office support you will need during surveying.**
- **Incorporate calibration**

# The Minnesota Team

- **1 BSS-experienced planner**
- **1 coordinator (January 2016)**
- **5 dental hygienists (May 2016)**
- **5 students (May/June 216)**
  - 2 student workers (MPH, BA wanting to go to dental school)
  - 2 dental research fellows
  - 1 intern (MPH field experience)



# Recruiting Facilities

1<sup>st</sup> attempt: letter, one-pager, Commissioner's memo, fax-back form

Sent to Administrator and Director of Nursing!

2<sup>nd</sup> attempt: phone call

3<sup>rd</sup> attempt: a follow-up letter

4<sup>th</sup>+ attempt: continue phone calls and emails (track as you go)

Pilot: send a letter before cold-calling

# Recruiting Facilities

We contacted 49 facilities to get 30!

- **13 declined participation**
- **5 stopped responding**
- **1 agreed, scheduled, and then canceled**



# Messaging

Friendly but authoritative.









- Stress the importance of the work
- Highlight benefits, advertise incentives to residents and facility
- State explicitly that this is not related to inspections or licensing
- Customer service—listen and answer questions
- Repeat yourself, provide information in multiple formats
- Send follow-up emails, call 3 days before visit





















# Timeline

- **July 18: pilot**
- **August 31: 25 sites completed**
- **September: students went back to school**
- **October 12: finished long-term care and congregate dining facilities**

# July

					<b>1</b>	<b>2</b>
3	4	5	6	7	8	9
12	11	12	13	14	15	16
17	18 	19 	20 	21 	22	23
24	25	26 	27 	28 	29 	30

# August

<b>31</b>	<b>1</b> 	<b>2</b> 	<b>3</b> 	<b>4</b>	<b>5</b> 	<b>6</b>
7	8	9 	10 	11 	12	13
14	15	16 	17 	18 	19 	20
21	22	23 	24 	25 	26 	27
28	29 	30 	31 			

Left to go:  
 5 LTCF  
 3 CDF



# Scheduling Facilities

Consider:

- Social events, picnic days, guest groups
- Religious services
- Medical appointments / care plan meetings
- Meal times
- Morning vs. afternoon
- Time of year / vacations
- Extra staff/volunteers for transporting residents

# Facility Visits

## First thing in the morning

- **Be patient, courteous, and friendly**
- **Hygienists and data recorders begin setting up screening room**
  - Get computers running
  - Establish clean and dirty areas
  - Make packs of supplies
- **Coordinator gets:**
  - Full census
  - Tour the facility
  - Meet staff helping with screening

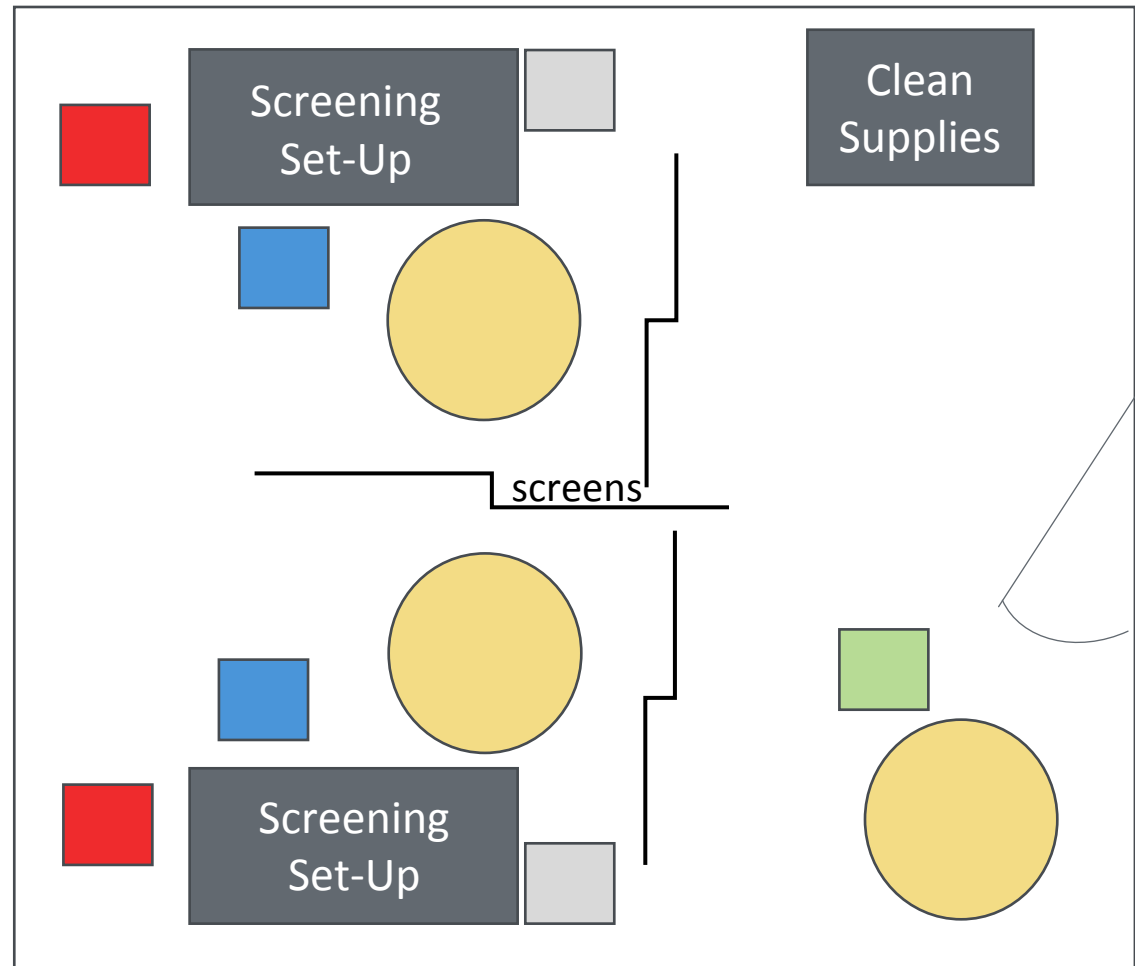
# Daily Set-Up and Staffing

**2 data recorders**

**2 dental  
hygienists  
1 coordinator**

**Areas for  
residents**

**MDH**



# Daily Set-Up and Staffing

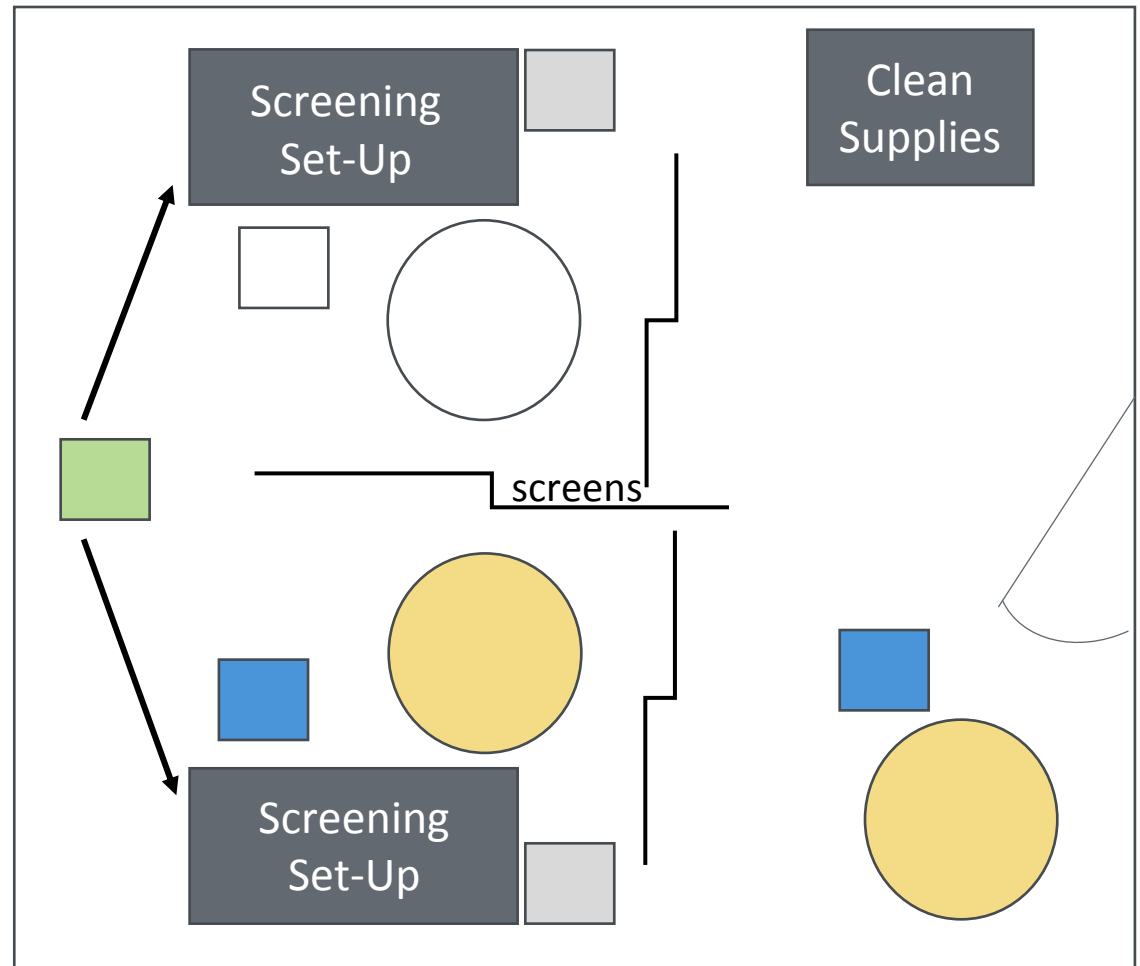
2 dental

hygienists

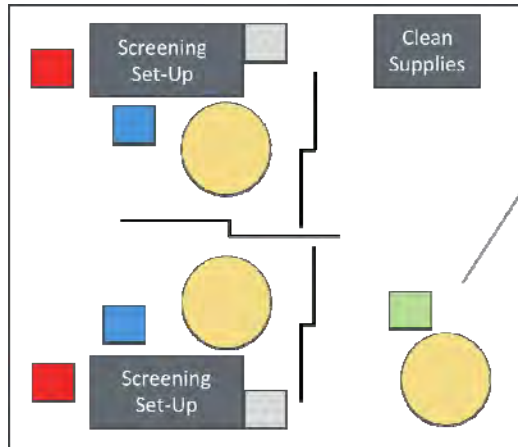
1 coordinator

Areas for  
residents

MDH



# Take-Away Lessons



- **Space will be cramped and different at each facility**
- **Consider space for wheelchairs**
- **Clean and dirty areas**
- **Bring extra privacy screens**
- **Explain ergonomics to applicants!**
- **There is little privacy**



# Epi Info

Site Info  
Site Code  Screen Date  Recorder ID  Hygienist ID

Patient Info  
Resident ID  Consent

Denture Screening  
1. Upper  2. Upper Use   
3. Lower  4. Lower Use   
5. Contacts   
Fixed Prosthesis Comment

Oral Screening  
6. Debris  12. Mobility   
7. Inflammation  13. Perio   
8. Number Upper  14. Dry   
9. Number Lower  15. Soft tissue   
10. Fragments  16. Treatment   
11. Untreated

Comment

Missed Fields 4

Currently experiencing pain?

# Consent / Sign-In Forms

## Older Adult Basic Screening Survey

### CONSENT TO PARTICIPATE

The Minnesota Department of Health recognizes the importance of oral health for older adults in Minnesota. It is important we understand the health status and needs of this population to better serve them. The information collected today may be used by the Minnesota Department of Health, policy makers, care providers, and other entities to understand the current oral health status of older adults and to develop policy and programs to protect, maintain, and improve the health of Minnesotans.

By signing this form, you acknowledge that you understand that:

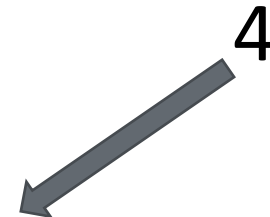
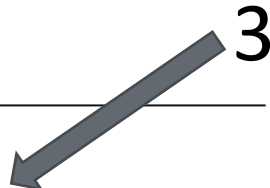
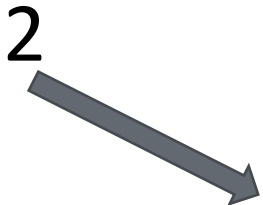
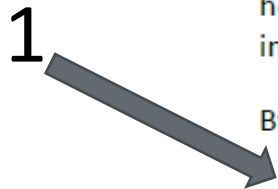
- This screening is completely voluntary,
- There are no consequences for choosing to participate or not participate,
- Your choice does not affect your current or future relationship with the Minnesota Department of Health,
- Data collected today will not include personal identifiers,
- Your identity will remain private and you will never be named in any reports,
- And findings published in public reports will only include summary data.

Name \_\_\_\_\_

Resident ID Number \_\_\_\_\_

Verbal Consent Given: Yes / No

Date \_\_\_\_\_



# Recruiting Residents

- **Meet with facility staff in the morning**
  - Explain the screening
  - Discuss messaging to residents
- **Ask for helpers during planning!**
- **To achieve adequate sample:**
  - Be confident
  - Set expectations—50% of residents?  
80% of residents?
  - Go room to room!

# Process Evaluation Form

## Facility Name

Facility Information	
Date/Time Scheduled	July 20, 2016
Address	123 West Main St, Saint Paul
Contact Name:	Administrator Name
Phone / Email	(###) ###-####

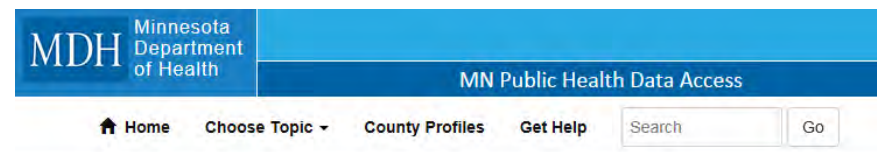
Daily Time Record					
Left GRB	AM	PM	Ended Screening	AM	PM
Arrived at Facility	AM	PM	Left Facility	AM	PM
Started Screening	AM	PM	Arrived GRB	AM	PM
Breaks Taken					
MDH Staff Attending					



Total Mileage	Estimated:	Driven:
Vehicle Number		

# Analysis / Dissemination


- Results in poster tomorrow!
- Weighting data
- MNOHSS
- Working with Delta Dental of Minnesota Foundation and MDH communications



## → Oral Health

 View Charts ▾

 Explore Data ▾

 About the Data ▾

### Oral health is essential to overall health



**Oral health** refers to the health of the entire mouth (oral cavity), including the jaw bones, teeth, gums, lips, inner lining of the lips and cheeks, the chewing muscles, roof and floor of the mouth, tongue, salivary glands, tonsils and adenoids (immune system), and pharynx (throat).

Oral health means being free of chronic oral-facial pain conditions, **oral and pharyngeal cancers**, oral soft tissue lesions, birth defects such as **cleft lip and palate**, and other diseases and disorders that affect the oral, dental, and craniofacial tissues (craniofacial complex) such as:

 **DELTA DENTAL**

DELTA DENTAL OF MINNESOTA FOUNDATION

MDH

# Moving Forward

- **Aging Initiative in the Center for Health Promotion (MDH)**
- **We are the only unit to have collected data on older adults in our Center!**
- **Sets us up for success in our future work**
- **Surveillance is a core function of public health!**

# Contacts

**Megan Clare Craig-Kuhn, Coordinator**

[Megan.Clare.Craig-Kuhn@state.mn.us](mailto:Megan.Clare.Craig-Kuhn@state.mn.us)

651-201-3969

**Bilquis Khan, Epidemiologist**

[Bilquis.Khan@state.mn.us](mailto:Bilquis.Khan@state.mn.us)

651-201-5405