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\textsuperscript{st} attempt: letter, one-pager, Commissioner’s memo, fax-back form

   Sent to Administrator and Director of Nursing!

2\textsuperscript{nd} attempt: phone call

3\textsuperscript{rd} attempt: a follow-up letter

4\textsuperscript{th}+ 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

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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

- **Screening Set-Up**
- **Clean Supplies**
- Screens
Daily Set-Up and Staffing

- 2 dental hygienists
- 1 coordinator

Areas for residents

Screening Set-Up

Clean Supplies

screens
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
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 ________________

MDH
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**

<table>
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<tr>
<th>Facility Information</th>
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<tbody>
<tr>
<td>Date/Time Scheduled</td>
<td>July 20, 2016</td>
</tr>
<tr>
<td>Address</td>
<td>123 West Main St, Saint Paul</td>
</tr>
<tr>
<td>Contact Name:</td>
<td>Administrator Name</td>
</tr>
<tr>
<td>Phone / Email</td>
<td>(###) ###-####</td>
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**Daily Time Record**

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<tr>
<th>Left GRB</th>
<th>AM</th>
<th>PM</th>
<th>Ended Screening</th>
<th>AM</th>
<th>PM</th>
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<tbody>
<tr>
<td>Arrived at Facility</td>
<td>AM</td>
<td>PM</td>
<td>Left Facility</td>
<td>AM</td>
<td>PM</td>
</tr>
<tr>
<td>Started Screening</td>
<td>AM</td>
<td>PM</td>
<td>Arrived GRB</td>
<td>AM</td>
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<th>Breaks Taken</th>
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<td>MDH Staff Attending</td>
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**Total Mileage**

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<th>Estimated:</th>
<th>Driven:</th>
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| Vehicle Number |  |
Analysis / Dissemination

- Results in poster tomorrow!
- Weighting data
- MNOHSS
- Working with Delta Dental of Minnesota Foundation and MDH communications
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
651-201-3969

Bilquis Khan, Epidemiologist
Bilquis.Khan@state.mn.us
651-201-5405