Senior Outreach
Strategic Communications Report

A Strategic Communications Plan for Montgomery County
October 2007

Conducted by:

REINGOLD

1415 Elliot Place, NW
Washington, DC 20007
Phone: 202.333.0400
Fax: 202.333.6622
Web: www.reingold.com

Project Team

Reingold, Inc.
      Kevin Miller
      Lynn Sullivan
      Rebecca Welch
      Valerie Stork
      Hillery Tsumba
      Barbara Wells

Montgomery County
      John J. Kenney, Ph.D., Chief, Department of Health and Human Services Aging and Disability Service
      Elizabeth Boehner, Director, Area Agency on Aging
      Charles A. Smith, Ph.D., Department of Health and Human Services Aging and Disability Services

BrainTrust Advisory Group
      Louis Nunez, Past Chair, Commission on Aging
      Dave Richman, Chair, Commission on the Aging
      Pat Streeter, Manager, Montgomery County Recreation Department, Senior and Therapeutics Program
      Carolyn Jones, Manager, Ride-On/Department of Public Works and Transportation
      Jeff Bourne, Manager, Montgomery County Recreation Department
      Bill Delaney, Program Manager, Montgomery County Fire and Rescue Service
      Arva Jackson, African American Health Program
      Keith Fleeman, Manager, Montgomery County Public Libraries, Little Falls Branch
      Scott Reilly, Assistant Chief Administrative Officer
      Deborah Koss, Investigator, Montgomery County Department of Housing and Community Affairs
      Margaret Campbell-Kotler, Commission on the Aging

Report Authors:
      Lynn Sullivan
      Janet Reingold
      Rebecca Welch
      Valerie Stork
      Hillery Tsumba
      Barbara Wells

TABLE OF CONTENTS

WORDS TO REMEMBER

The average American is bombarded with 3,000 – 6,000 messages a day.
— Caroline Roan
U.S. Department of Labor

By age 16, the typical American will have seen almost 6 million ads. That's more than one per waking minute.
— The New York Times

People don't want to be "marketed TO"; they want to be "communicated WITH."
— Flint McGlaughlin

Strategy and timing are the Himalayas of marketing. Everything else is the Catskills.
— Al Ries

EXECUTIVE SUMMARY

Montgomery County delivers public health and human services that address the basic and critical needs of the County's most vulnerable children, adults, and seniors. The Department of Health and Human Services provides many of the County's programs for seniors, particularly in the areas of care management, supportive services, and nutrition; however other County departments also provide critical senior services, including transportation, affordable housing, fire and safety, and recreational opportunities. The County's departments are challenged to both deliver the services that seniors need and ensure that seniors and their caregivers have the information they need to access them.

To help the County to increase awareness about senior services, Reingold has developed a comprehensive strategic communications plan for outreach to seniors and their caregivers. The plan presented in this document is based on the review and analysis of County written materials, strategies, and partnerships. Reingold conducted surveys, focus groups, and interviews with County seniors and caregivers both to evaluate the effectiveness of the County's communications and to identify areas for improvement.

This research found widespread satisfaction among seniors and their caregivers with the programs and services the County provides. However, it also underscored many ways to improve the County's communications that would help residents more easily find and understand information about the particular services they need. Better communication strategies could increase participation in many County programs and raise community awareness of County-funded services provided through nonprofit partners.

Because many departments (e.g., Fire and Rescue Service, Department of Housing and Community Affairs, Department of Public Works and Transportation, Recreation Department) offer County programs for seniors, there is no single, coordinated source of information for seniors and their caregivers about the full array of services available. As a result, seniors are not aware of County services; cannot easily identify them; do not associate the County services they *do* use with the County; and do not seek out services until they are in a crisis and need immediate help. Reingold recommends responding to these challenges using the following approaches:

RECOMMENDATIONS

1) Improve Internal Communication

A survey of County department directors found that 12 of 15 are willing to leverage their own resources and those of their partners by collaborating with other County departments to maximize the dissemination of information. In fact, 89 percent of respondents already have worked with HHS. This provides a strong foundation upon which to build a communications plan. Yet other respondents reported several barriers to collaborative communication: lack of opportunity to work with their counterparts, inadequate information about the activities of other County agencies, and slow approval processes

when there is an opportunity to collaborate. The first step toward improving the County's external communications is to improve its internal communications.

Establish a mechanism for improving coordination of senior services programs: This mechanism would establish and facilitate greater coordination and collaboration across the County's many senior programs, leading to the development of a common identity and consistent message for information directed toward seniors and their caregivers and improved quality assurance for senior services.

Provide ongoing staff training on senior resources: Although each department provides an orientation program for its new staff, there is no cross-departmental orientation on senior services. Since the content of most orientation programs is lost over time—whether because of the presentation's timing, structure, medium, or content—the County needs to develop an effective *ongoing* cross-departmental training curriculum for staff who regularly work with seniors.

Foster internal networking and discussion: The County could improve internal communication by hosting a cross-departmental senior services discussion forum monthly, or at least quarterly. This forum would be open to staff and managers at every level who are working with seniors.

Create internal electronic communications tools: Electronic tools such as email blasts, message boards, and listservs would enable staff across all County departments to access timely, accurate information about programs and services for seniors. Interactive listservs are particularly helpful because they enable all participating County staff to contribute specialized knowledge and updates that a central information source might not have.

Leverage County services: Seniors look for information about County services through the services and programs in which they are already involved. When asked about where they go to find information, 58 percent of seniors said they check at the library and 55 percent ask at their senior center. Staff of these programs should be trained and equipped to provide seniors with information and materials on the full range of County services.

2) Establish a Consistent Identity

The key to the growth and long-term success of any communication strategy is having a unique and identifiable position in the minds of core audiences. However, Reingold found that the County's wide variety of services and service providers have produced an eclectic mélange of materials that are unable to deliver a strong, consistent identity that citizens can easily recognize. Individually, some of the pieces may communicate well, but with no consistent approach, they cannot support each other in a larger, overarching mission.

The survey found that 42 percent of respondents were unaware of any County services specifically for seniors. When prompted, 79 percent recognized senior centers, but did not identify them as a County service. To increase awareness and recognition of its senior

services, the County needs to uniformly brand its senior program so that citizens think of the turning to the County when they need services. A consistent, focused message and appearance will enhance the community's appreciation for the services provided by Montgomery County and will connect senior programming to the goodwill, reliability, and trust that the Montgomery County imprimatur implies.

Create design templates: Design templates with consistent color schemes and styles for all materials on County senior services can establish identifying marks, images, fonts, colors, and language to distinguish them as part of a suite of related services. The new identity should enhance the existing look of materials for seniors and complement those used by County departments and grantees so they can be used together as needed.

3) Create Clear, Targeted Messages

When communicating in a crowded marketplace, it is important to deliver messages clearly, efficiently, and consistently. However, many County publications bury key information—such as phone numbers and website addresses—deep in heavy, confusing text. They also lack an overarching, unifying theme that ties them together in a way that appeals to seniors.

Create a recognizable tagline: The surveys identified basic themes that appeal to seniors such as valuing the senior population and enabling them to age in place. A single tagline that captures this appeal should be used in every one of the County's communications on senior services, both to brand the services under one umbrella and engage the audience. Some possibilities include: *Montgomery County is Senior Friendly; You Can Age in Place in Montgomery County; Montgomery County. Your Community. For all Ages;* and *Montgomery County: No Place Like Home.*

Focus on senior benefits: The County's materials should be focused, homing in on exactly how the program or service will benefit the audience, engaging the readers and driving them to action. The most popular terms identified in the testing of message points were *help*, *benefit from*, *learn*, and *friendly*.

Emphasize seniors' sense of self-worth: Seniors are sensitive to terminology and the perceived stigma of aging. In the focus groups, active and fit participants avoided services they associated with the physically or mentally disabled. Many participants assumed they were too healthy or too wealthy to qualify for any government programs. County messages should clearly define the term "senior" and indicate the activity levels appropriate for each service.

Clarify any eligibility requirements: The survey found that most seniors would be likely to take advantage of a County service if they knew it was available regardless of income, ability, or age. County communications should be very clear and up front, about the target audience for a service—and especially underscore when services are available "at no cost to residents."

Feature success stories: Materials should include short vignettes and anecdotes to make its messages easy and enjoyable to read. Stories of real people who have benefited from County services are particularly effective in holding the audience's attention and illustrating how they might use these services.

4) Simplify Presentation

Publications can use strategic design elements, such as compelling images and text call outs, to guide readers through the information. Simple, user-friendly design is a requisite for seniors, who often are experiencing the affects of aging, and their caregivers, who often are harried and stressed.

Follow design principles for seniors: Typeface, font, layout, color, contrast, alignment, and the balance of text and white space all affect the ability of seniors to easily read printed material. The County needs to ensure that all publications targeted to seniors are sensitive to the effects of aging on seniors' vision.

Use concise language: All materials should use short, bulleted points, pull quotes, and text boxes with brief, easily understandable messages.

Reorganize the *Montgomery County Seniors' Resource Guide*: In the focus groups, caregivers who were familiar with this comprehensive information source said it would benefit from better categorization and formatting, and also suggested abbreviated telephone lists that could be posted on a refrigerator or a single-page list of County resources.

Add more bilingual publications: With a growing minority and multicultural population, the County needs to produce more of its materials for seniors in languages such as Spanish, Korean, Chinese, Russian, Farsi, and Vietnamese. Publications also could include internationally recognizable images and creative elements to communicate with non-English speaking audiences.

5) Use the Power of the Internet

Once seniors become familiar with Internet technology, they are devoted users. The mall intercept survey found that 47 percent of seniors—and 71 percent of their caregivers—would look to the Internet for information about senior services. Within County departments and among the County's partners as well, there was strong demand for the easily accessible, up-to-date information that a well organized website and regular e-communications can provide.

However, senior services information on the County's website is cluttered, confused, and difficult to find. Other e-tools, such as e-newsletters, are underused. Even email is an untapped resource: our survey found that less than half of County staff use email to share information about programs for seniors.

Establish a webmaster for the County website: The website lacks cohesion and coordination among content from various departments. A central webmaster could create that cohesion and, in particular, ensure that content on senior services was interconnected.

Aggregate the website's information for seniors: The County website has a wealth of information on senior programs and services, but it is scattered across a host of agency web pages where it can be nearly impossible to find unless you know where to look. The County's senior information should be aggregated on one easy-to-find and easy-to-use website, requiring no more than three clicks for customers and staff to find what they need.

Create a memorable website address and optimize keyword searches: The County Department of Technology Services should enable Aging and Disability Services to create a domain address that is easy to remember. For seniors and caregivers who begin with an online search, the website's landing pages should be enhanced so that visitors are driven to them when they search by keywords—such as "Montgomery County seniors." The County also could sponsor links on website search engine pages to increase website traffic.

Improve web page design: On each web page the key information of greatest interest to users should be front and center—not below the fold or hidden behind links. Clearly marked and descriptive drop-down menus beneath primary labels should guide users to the information they seek. Fonts should be easy to read—with a tool on each page to enlarge the font size if necessary. And content should be simplified and reorganized to immediately engage users and get them to the second "click" to go deeper into the site. In addition, the County website should be 508 compliant. Currently the County home page lacks rollover descriptions for graphics and descriptive Meta tags for keywords and paragraphs, which are especially important for the many seniors who have visual impairment.

Link to partner websites: Organizations such as the Jewish Council for the Aging have large constituencies and well-developed senior services. The County should create cross-linkages with their popular websites, both to direct seniors to such partner resources and draw the partners' audiences to information about County services.

Create e-tools to communicate with seniors, partners, and staff: Online newsletters, listservs, and news-feeds are quick, cost-effective ways to share information. In addition to creating such tools, the County should see that program staff are trained in using them most effectively and keeping them up-to-date.

6) Enhance Personal Contacts

Although seniors and their caregivers can obtain information from printed material and websites, personal contact with County representatives—particularly by telephone—is an important component of the County's communications. Placing a phone call to the Aging

and Disability Services is often the first step many people take to find information about senior services and programs. The focus groups felt that poor customer relations indicated a lack of quality in program delivery.

During focus groups, some participants expressed frustration and disappointment with the responsiveness of the County's telephone service. However, Reingold's research using a "secret shopper" found this service to be helpful and staff responsive. Further attention and research is needed to figure out the source of the difference between the public perception and the data found in this limited study.

Investigate seniors' discontent: To improve the County's personal interactions with seniors, it would be helpful to investigate the source of seniors' discontent, monitor actual seniors using the hotline, and run a small sample customer satisfaction callback survey.

Enhance training for telephone representatives: Based on that information, the County could train staff to interact more effectively with their callers, ensuring that seniors and their caregivers are greeted warmly—perhaps using a new senior services tagline—and directed to the information they need. Telephone staff also need to be prepared to give callers time—avoid rushing them and help them formulate their questions if they have difficulty identifying specifically what they need.

When possible, provide opportunities to speak to live telephone operators: Particularly for caregivers with full-time jobs, there is frustration with automated telephone systems and being placed on hold during office hours. In our focus groups, they expressed interest in a system for scheduling an appointment to speak with a responsive, informed County representative.

Establish personal contacts for partner organizations: The County's relationships with partners, both formal and informal, can be strengthened by establishing a single point of contact for each one. Our survey found that partners who could name a specific "go to" person in the County government were most satisfied with the County's communications effort.

7) Strengthen Community Communication Channels

To extend its reach and increase its impact, Montgomery County needs to leverage the resources of a variety of partners—from organizations under formal contracts with the County to provide services, to informal partners with complementary missions and constituencies, to individuals in the community who regularly interact with and influence seniors and their caregivers. The County has opportunities to cultivate new partners while increasing the capacity of current partners to provide information and services to seniors.

Use trusted advisors: Seniors rely on a variety of friends, family, and "trusted advisors" to help make health and lifestyle decisions. The County should enlist these personal contacts in the community, including doctors, pharmacists, and physical therapists, to

help channel the County's information about services to seniors. Materials should be created for these contacts as well as for seniors who are using County services and wish to share information about them with their cohorts.

Expand the partnership base: Our survey found fertile ground for expanding the County's network of partners, particularly for disseminating information. Places of worship are a good place to start: among the survey respondents, 63 percent are members of AARP and 60 percent belong to a church, synagogue, or other place of worship. Representatives of private sector senior service programs, such as assisted living facilities and meal delivery services, expressed interest in sharing information on noncompeting services. And to respond to concerns among some survey respondents about cultural sensitivity, the County could strengthen relationships with organizations such as the Spanish Catholic Center of Catholic Community Services as well as publications such as the *Washington Chinese News* to raise cultural awareness within its programs and reach seniors in minority groups.

Use opportunities to give community presentations: An efficient outreach method is to enlist County managers to speak about available services in venues such as residential coffees sponsored by neighborhood citizen associations, or offer educational sessions in neighborhoods and buildings with large senior populations. Management staff should be equipped with an interesting presentation to share and useful materials to leave behind.

Foster networking and discussion: Similar to discussion forums for County staff, the County could enhance its partnerships by hosting periodic senior services discussion forums or monthly breakfasts. Meetings or social events would enable partners to exchange information among themselves and with County staff and also develop working relationships across organizations. These events also would create an opportunity for partners to bring in new potential partners.

Create partner tools: All partners can be more effective when they have ready-to-use tools for outreach and communication. These may include advertisements and posters, articles to insert in their newsletters, PowerPoint presentations, postcards and brochures, speakers' bureaus, and email templates.

Create information on County funding programs: Many County partners are frustrated by ambiguous requirements associated with County funding. The County could enhance existing partnerships and perhaps expand the pool of grantees and contractors by providing clear, concise instructions for the application process and compliance with project implementation requirements.

8) Complement Paid Advertising with Earned Media Coverage

Reingold looked into media coverage of senior services and programs offered by Montgomery County. The research found significantly fewer story results than expected. This pattern indicates that the press releases being distributed by the county are not being picked up by local newspapers. The County could make better use of this mechanism by

structuring press releases to be more appealing to reporters, editors and the general public.

Advertise in local media outlets: Montgomery County has done a good job of using the local media to keep citizens apprised of events, programs, and services through calendars in the *Gazette*, *Washington Post*, and *Washington Times*. In our survey, 46 percent of respondents said the County should advertise its services in newspapers.

Generate earned media coverage: Reingold's multi-year media review revealed a low number of stories in local newspapers. The County should focus on generating more coverage through human interest stories and by preparing press packages highlighting its services and events.

MESSAGING FRAMEWORK

Montgomery County has the distinction of being a great place to live, work, raise a family, and grow a business. With a first-class public school system, a vibrant recreation and parks system, and a library system ranked in the nation's top ten, Montgomery County has a tradition of good government that delivers quality services. To benefit from the shine of the Montgomery County's sterling reputation and build awareness in the market, **senior service programs and offerings should be intimately tied to each other and to the County**. That requires an identity: a brand for senior services that showcases the value, the results, and the service to key targets.

Identity

The County needs to define the benefits and programs it offers to seniors and give potential customers a reason to remember them. Senior programs need a public image that stands out strategically and reinforces their ability to deliver the highest quality results. To craft that image, materials that look the part and engage your audience are needed.

The values that need to be conveyed: help, benefit from, friendly—emphasizing the community and community nature of the services. A high-end design will offer a nonverbal cue to the quality of services, and logo tagging will begin to convey the easy availability of services.

Message One: *Accessibility. This is for you.* Residents overwhelmingly felt they would be more likely to use services if they knew they were not restricted to the low-income or disabled or if they were age appropriate. This may be an appropriate place to develop iconography indicating physical ability, income restrictions, and age levels necessary for participation.

Message Two: *Self-worth. You are valued.* Residents and caregivers are sensitive to the terminology and the perceived stigma of aging. They don't want to be sidelined while they're still active and able to contribute. "Seniors at the center of the action" is the appropriate message to deliver.

Message Three: *You are not alone. We are here to help.* The messaging should center around community support. Your community and the County have developed resources to fit your needs. We have free transportation programs that go where you need to go. We have nutrition services at every level, from social group luncheons to Meals on Wheels.

Message Four: *We are easy to find and use. Just look.* For this message, the delivery *is* the message. Saying it won't make it so. The ubiquity of the logo and materials and outreach will make this statement.

Proof Points: We are on the Web.
We are on the phone.
We are in your phone book.
We are speaking in your community center.
We are at your pharmacy.
We are at your place of worship.
We are at your doctor's office.
We are at your physical therapist's office.
We are where you live.

Call to Action: One important part of building this brand is making services easily accessible to residents. For seniors and caregivers, this means an easy–to-find, easy-to-navigate website that turns up in a search and a responsive, well-informed, culturally sensitive Information and Referral Hotline. All communications materials need to have the phone number and web address as a call to action. Moreover, this is where the County absolutely cannot fail to deliver on customer service. These services need to be top-flight and fully functional to establish credibility for the rest of your communications.

COMMUNICATIONS AUDIT

Reingold reviewed and analyzed a selection of County materials targeted to seniors and their caregivers to determine the direction and effectiveness of the offerings and identify areas for improvement. This communications audit aims to evaluate the overall quality of the materials, identify their strengths and weaknesses, and make preliminary recommendations for future directions.

METHODOLOGY

The evaluation entailed a thorough review of a sample of County-produced communications targeted to seniors and their caregivers. Among the items evaluated were flyers, brochures, booklets, magazines, annual reports, a pill dispenser, and websites. As much as possible, each communication was examined from an outsider's perspective—that of a person who did not know about Montgomery County's services for seniors. The goal was to determine how the messages are received in the marketplace and what exactly is conveyed to seniors and caregivers in Montgomery County.

Each product was evaluated for concept, content, style, and clarity—in particular:

- Purpose, strategic direction, and clarity of messaging
- Identity presence and efficacy
- Color, design, ease of use, readability, legibility and layout (with particular attention to design principles useful for communicating with senior audiences)
- Creative concept and suitability of the concept, given the intended audience(s)

Successful Communication Strategies

The key to the growth and long-term success of any communication strategy is having a unique and identifiable position in the minds of core audiences. Each piece must be simple, with a well-defined purpose and attributes that core constituents value. The overarching theme of each piece must elucidate the value delivered to target audiences, and each submessage must directly speak to some community. Ultimately, consistent, focused use of themes will help deliver the Montgomery County promise to seniors; it will connect senior programming to the goodwill, reliability, and trust that the Montgomery County imprimatur implies. Use of a consistent look will help build an understanding throughout the community of your commitment to the senior community, the extent of your offerings, and buy-in for accomplishing the overall mission.

Developing a **cohesive identity and look or tagline** for your communications is critical. The new identity must enhance the existing look of your senior materials, and must complement those used by various County grantees and departments so they can be used together as needed. The tagline must speak to your target audiences—inviting them to explore the value of Montgomery County's senior offerings, investigate various programs and services, and consider their usefulness. A standard look will help seniors feel secure

in accessing the services. They already view Montgomery County as a trustworthy provider, but they don't know what senior services the County offers.

To capitalize on that trust, the County can create a visual "senior identity" that will help build familiarity and recognition of the variety and depth of services the County provides to seniors. The development of a distinctive senior look will give an identity to a whole suite of services, making it easier and more appealing for seniors to identify and access them. A logical outgrowth of this consistent look and feel is the development of a brand family for senior services. An appealing identity should also encourage businesses and nonprofit organizations to seek you out. As an ancillary benefit, recognizable presence of County-provided senior services may help reduce seniors' antagonism (heard in our focus group discussions) about paying high Montgomery County taxes!

Our approach draws on principles that Reingold has learned from 20 years in the relationship marketing, community education and empowerment, and communications business. Each communication must be simple, clean, and inspirational. It is important to think visually when planning communications to really engage the audience.

Why is a Successful Communication Strategy Important?

A unified, consistent, and well-implemented communications approach will build loyalty to Montgomery County and a deeper understanding of the services offered. A central communication strategy will be an important tool in accomplishing the mission of the County by advancing the understanding of both the identity and of the underlying resources themselves.

Usability. To reach the target audience when presenting text-based information, it should be written and designed with usability in mind. Reingold's philosophy in developing communication is to take a "less is more" approach. Especially when communicating with seniors, publications need to be clean with brief descriptive text.
They should be written from the user's point of view; with shorter, less dense copy; and written at an appropriate technical level, if not the audience will be lost.

Legibility. Headlines, callouts, bullets, white space, etc., will improve the legibility of a product. Standard techniques to enhance legibility include the use of a strong contrast between the type and the background color. Standard black-on-white is recommended for its highest contrast. While visually striking, reverse type (white-on-black) may alienate older readers, as their eyes take in much less light. A major change in the aging eye is the shrinking of the pupil, resulting in the need for more light and a diminished capacity for adjusting to changing levels of illumination. According to the American Optometric Association, the light received by the retina of a 60-year-old and an 80-year-old receive 33 percent and 12 percent, respectively, of the light received by the retina of an average 20-year-old.

Legibility also is enhanced by high luminance and color contrast, larger targets, and increased spacing. A review of recent research on patient labeling for seniors, supports

the use of larger fonts, lists, headers, and white space, using simple language and logical organization to improve readability and comprehension. Typeface style, size, weight and leading, color selection, paragraph alignment, paper and ink choice, and graphic selection and placement also have important implications for legibility. We outline our recommendations in Appendix 1.

KEY FINDINGS

Montgomery County has clearly recognized the importance of and need for informational products geared toward seniors and caregivers. Below are our key findings based on a representative sample of those products' strengths, weaknesses, concept, content, style, clarity, purpose, and strategic direction.

Analysis of the Purpose, Strategic Direction, and Clarity of Messaging

Some print materials do an excellent job in communicating with clarity; others are less effective. When communicating in a crowded marketplace, it is important to deliver messages in a clear, efficient, and consistent manner. The blue brochure, "Family Caregiving" (sample 1) clearly delivers its key message: "The best way to help is to recognize it's not all up to you."

The full page "Call N' Ride" flyer developed in August 2005 by the Department of Public Works and Transportation (sample 2) quickly guides people to relevant and important information, while also educating readers in a straightforward manner.
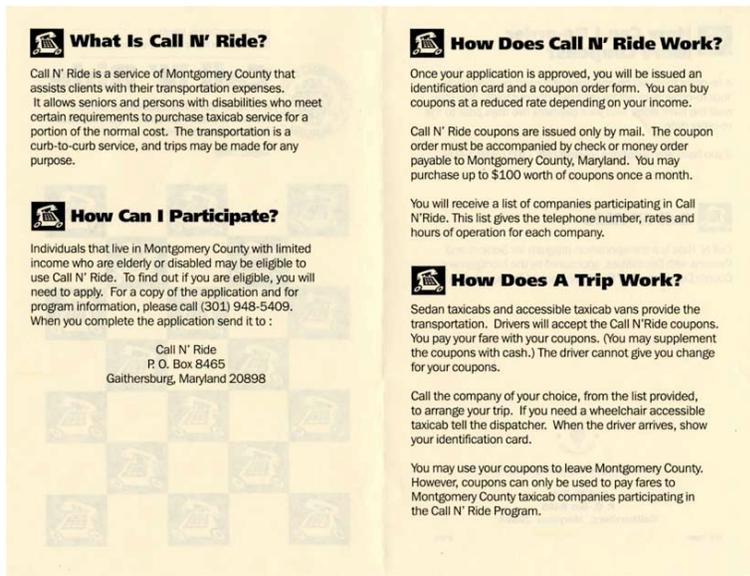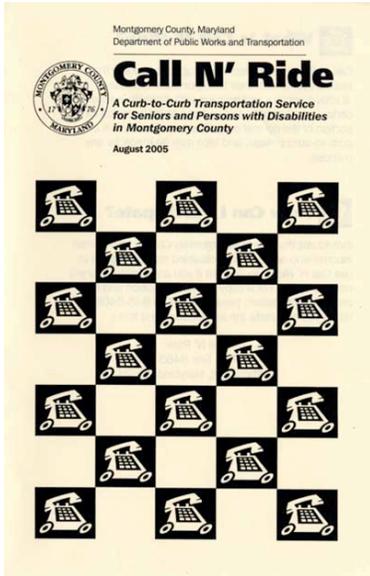
Other materials are less effective. For example, the blue and white brochure, "Information and Assistance Unit" (sample 3), does not deliver a clear or understandable message to its reader.
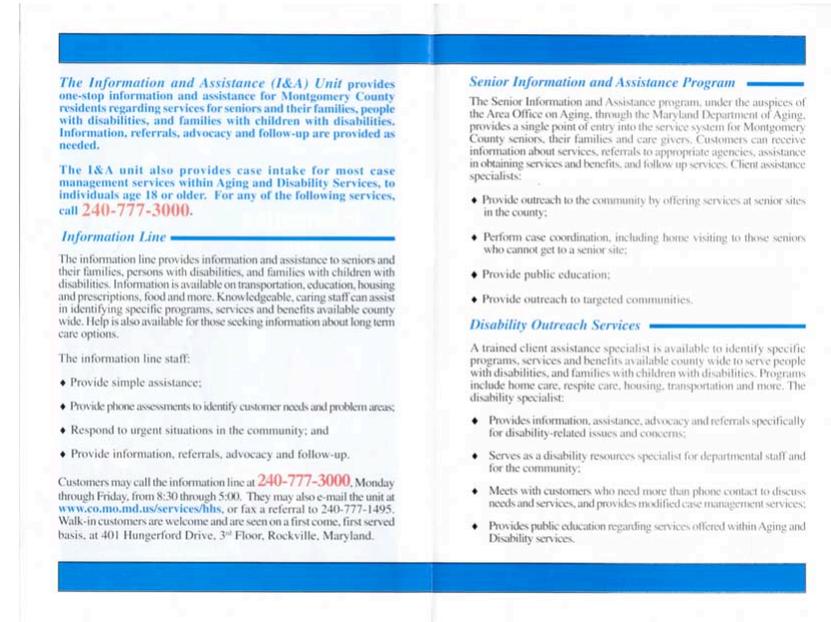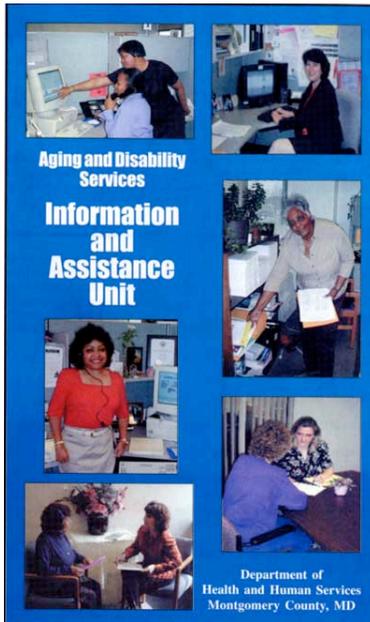
In the "Comprehensive Guide to Public, Private, and Non-Profit Transportation" (sample 4), relevant information such as phone numbers for grocery shopping transportation and addresses of key websites are buried in the text-heavy guide. Many readers will not have the time or inclination to read publications in their entirety. Because lengthy pieces often intimidate readers, an abbreviated and more structured version of the guide—with more white space—would offer the reader "quick hits" about how to best get around town.

In addition, because seniors are often confused by the complex transportation system in and around Montgomery County, it is important for all communication pieces regarding the transportation system to be presented in layman's terms, making it easier for seniors to understand with icons and simple graphic routing instructions for the LEP population.

With age, it becomes more difficult to distinguish between the relevant and the irrelevant elements in a communication. Although the message should be straightforward, mature adults are more skeptical of advertising and marketing messages and are more responsive to facts and figures than soft messages without substance. The County needs to provide relevant and credible testimonials as appropriate to help illustrate key facts.

The telephone information and assistance system is a valuable resource. Most often, the first interaction County staff will have with a resident is over the phone. For example, for many people seeking to find information about senior services and programs, placing a call to the Aging and Disability Service Department is their first step. Therefore, it is important to know the effectiveness and quality of this communications tool. Although the purpose and strategic direction of this resource are obvious and appropriate, the clarity of messaging may be off-point.

During focus group discussions, we encountered frustration and disappointment with the responsiveness of the telephone service within Aging and Disability Services. The primary area of frustration came from the reported challenge of reaching a live agent. Numerous comments were made about reaching an automated service and not being able to easily transfer to a live operator. Further complaints drilled in on the charge that when a live person was reached, they were not trained or knowledgeable in the topic area, leading to a flurry of transfers.

To investigate this further, we conducted a "secret shopper" survey. Surprisingly, when we called the number on numerous occasions we encountered helpful and responsive staff who were able to refer us to an appropriate expert for each question. This experiential **discrepancy begs for further research.**

Perhaps the County has made changes in the phone information and assistance system of which the seniors were unaware, and their unhappy experience was with a previous failed system. If true, that scenario would indicate the need for advertising of the new paradigm. It is also likely that seniors and caregivers do not simply want another number to call. They want some level of instant gratification, or to be transferred directly to an expert who is available and who can answer their question. That preference would indicate the need for more training of the information and assistance team with greater emphasis on *assistance* over *referral* and greater depth of information on each program available to the response team in a searchable database.

Perhaps the "secret shoppers" questions were more direct than that of the typical senior who may be browsing for information in a call rather than looking for specifics. The use of the telephone service to fish for information suggests the need for a screening question

from the service to the caller. To make improvements in this area, Montgomery County should probe seniors to discover the real source of their discontent; should monitor actual seniors calling the hotline to test the service responsiveness to an older cohort's method of inquiry; and should conduct a small sample customer satisfaction callback survey to see if the satisfaction rates have improved.

The website design makes it difficult to find useful information. Although a record number of seniors in our survey indicated they would look for senior information on the Internet, it is difficult to find it on the County website. When we typed in "Senior Montgomery County," it required three clicks to find the right page. The burial of the page deep within the website conveys the false impression that the County doesn't wish the services to be found. In addition, the information is not comprehensive and does not contain links to all other providers. Web page and addresses need to be easy to find with a logical search. A detailed discussion of the website is contained in a separate report, the Website Review.

Analysis of the Identity, Presence, and Efficacy

County materials need a strong, distinct identity. It is evident that the County has emphasized creating materials that educate readers on relevant County services for seniors. Individually, these materials have been very effective in describing specific programs and services. However, the wide variety of services and service providers communicating in the marketplace has resulted in an eclectic mélange of materials for seniors and caregivers that are unable to deliver a strong, consistent identity that citizens can easily recognize.

The County's materials have no identifying marks or consistent use of imagery, fonts, colors. No standard layout distinguishes the information as being part of a family or suite of programs and services offered by or in partnership with Montgomery County. There is no consistent tone or use of language. As the County's materials evolve, a cohesive design will become increasingly important to reaffirm the strength and benefits Montgomery County has to offer. This cohesiveness can be reinforced in various ways according to the specific purposes and targets of each publication.

Analysis of Color, Design, Ease of Use, and Layout

Strategy should be evident through color, design and layout. In general, the publications look attractive but do not accomplish a vital strategic goal of creating a distinct look and feel. The materials produced by the Department of Health and Human Services do not maintain a consistent appearance and experience because of variations in color, design, and layout. Nor is there a consistent look and feel between the communications for seniors developed by different departments.

In general, the color schemes vary with publications ranging in color palettes of blue, brown, red, orange, yellow, white, and black, just to name a few. For example, although they were both produced in early 2006, the "Staying Sharp" brochure has a color scheme

of white, blue, yellow, and green, while the "What Are You Doing for Lunch" brochure has a color scheme of white, orange, and black. The tri-fold brochure, "Family Caregiving," is printed on blue and white cardstock with bold text and large font throughout the piece. On the other hand, the ¼ page – double-sided flyer, "Help Your Aging Parent or Loved One by Calling Us," has a brown and white color scheme with small font throughout. Although both products are produced by the Department of Health and Human Services and are targeted toward caregivers, neither product visually creates a sense of belonging to one organization, with one identity and purpose.

There are no apparent creative standards for layouts and fonts throughout the marketing pieces. For example, the full page, black and white flyer titled "Aging and Disability Services" has a simple list of four contacts and phone numbers, while the full-page, color flyer titled "Learn about Programs and Services for Seniors and People with Disabilities" has five color photos, bold headings, and call out boxes. As a result, the two flyers fail to communicate a consistent and unified application of creative standards, even though both pieces are communicating similar messages to the same target audience.

Approached individually, some of the pieces may communicate well, but with no consistent approach, they fail to support each other in the larger mission of communicating that Montgomery County cares about its senior population. Each publication represents a chance to build on previous messages; this valuable opportunity is squandered in the current communication environment. There is no sense of a long-term mission.

Analysis of the Creative Concept and Its Suitability for the Intended Audience(s)

In general, the publications are not creatively stimulating and do not create an effective call to action. The materials reviewed in the audit offer little visual stimulation; pages are cluttered with text and photos, and as mentioned earlier there is no clear design strategy. Compelling and relevant information is either too long or buried beneath a landslide of text with no clear call outs or special designation (e.g., text boxes and shaded text).

Of the materials we reviewed, the publication with the best creative stimulation and most effective call to action is the "Help Your Aging Parent or Loved One By Calling Us" double-sided, ¼ page flyer. It not only successfully communicates the key message, but also catches the reader's interest with a relevant and stimulating graphic. In addition, the flyer achieves an appealing and user-friendly balance of white space and use of bulleted text with short sentences.

Publications like the one described above with strategic design elements and better use of images and text call outs (e.g., bullets, boldface type, headers, and color) will guide readers through publications and create a connection between the audience and the County's beneficial services. Seniors, caregivers, potential partners—anyone who reads the publications—will recognize the intended audience, become aware of your services, and gain confidence that the County can deliver on its promise.

More compelling copywriting could increase readability and effectiveness. Most of the publications use a very effective and caring tone; however, often they provide too much information. For example, the blue and white "Information and Assistance Unit" brochure has several long sentences that add little value to the brochure. As designed, the text-heavy brochure requires readers to search for the right and relevant information, instead of including only essential, simple, and clear text.

Because the audience is already somewhat skeptical, cynical, and confused about the services available to them, the information provided must appear to have no one's best interests in mind but theirs. Communications must be designed not to sell or condescend, but rather to open a two-way dialogue that is informative and respectful.
In general, readers benefit most from publications that have clear, concise text. Publications should use quick-hitting sentences, short bulleted points, pull quotes, text boxes, short vignettes, anecdotes, and more white space to streamline the information. Design should carefully consider guidelines for legibility, font size, and backgrounds that have been suggested by previous studies of seniors. (See Appendix I.)

RECOMMENDATIONS

Montgomery County has the opportunity to craft a strategic and comprehensive approach to communications materials for the senior population, taking into account the various services and their respective levels of public awareness, and target audiences. The next stage, developing a strategic communications approach, is a critical one that will determine the department's long-term success. An effective communications process requires strategic planning and uniformity in scope and message. It is critical to impart a sense of caring, foster a keener awareness of programs, and direct a call to action. Major efforts should be made to address the following issues.

Purpose, Strategic Direction, and Clarity of Messaging

Tie materials to a central strategy. Although each communication serves its own purpose, each should have a specific role in the fulfillment of the overall communications effort. The County's global outreach to seniors will need to promote its identity and its services at many levels; all communications must do their part to ensure overall success.

Include a call to action in all communications materials. When appropriate, the County's materials should engage the reader and drive action. Materials should feature the benefits of getting involved with the organization and answer the questions, "How can the services help me?" and "How can the County make a difference in my life?" Overall, the County's collateral must send more compelling messages to each audience and offer emotional, as well as factual, reasons for reading the information and then taking action.

Identify eligibility requirements in all communications materials. Because eligibility is a source of confusion, it needs to be addressed consistently in each communication.

Maximize use of phone center. Calls to the information and assistance center will likely be one of the principal actions prompted by any outreach effort, and the center often is the first contact a senior has when attempting to navigate the system of senior services. In addition, potential partners will use it to gather information about current programs and services. The media will also place calls to the hotline as a source for relevant articles. To the under 40, new-media savvy cohort, the hotline is effective in projecting an excellent first impression of knowledgeable County information. Assistance should be efficient and appropriate. However, many seniors and caregivers do not have this expectation for County services. The County should work to ensure that your senior and caregiver customers are greeted warmly and given the information they seek.

While online tools may be helpful to those seniors and their care providers who have Internet access, studies conducted by Age Wave Health Services during the educational campaign for Medicare Part D found that most Medicare recipients themselves prefer obtaining information by telephone. During the 2003 Medicare drug discount card campaign, call center enrollments were nine times more prevalent than online enrollments.

The County should include office hours in the customer service automated voice answering system. With the inclusion of office hours in the automated voice messaging system, residents will better understand when they will be able to speak with a live person. In addition, the alternative TTY hotline number (240-777-4575) must be in working order. The phone number is always busy and does not connect to a County representative.

Provide website offerings that are comprehensive, linked, and consistent. The senior population is becoming comfortable with computers and the Internet, both because an increasing number have technology backgrounds and because the technology itself is becoming easier to use. According to Dr. George Moschis, Professor of Marketing and Director of the Center for Mature Consumer Studies at Georgia State University, "Seniors are very results-oriented. If you show them benefits, they will use the Internet." AARP has a very successful website that offers information and resources important to seniors.

Once seniors do become involved in Internet technology, they are devoted participants who can commit great amounts of time. In fact, seniors who have access to the Internet are twice as likely as younger people to use the technology, according to Moschis. The Pew Internet and American Life Project found that mature adults are the most active adults on the Internet; 15 percent of people age 65 and older go online every day. The mall intercept survey found that a full 47 percent of Montgomery County seniors would look on the Internet for information about senior services.

Identity, Presence, and Efficacy

Create and implement graphic standards to distinguish your identity as well as define technical requirements. It is critical to develop a common style/identity for all department materials in order to raise awareness, ratchet up visibility, and build your brand recognition. We recommend creating overarching design elements for all senior programs and services and establishing design templates for the materials to ensure they share a unified look and feel. Each template should use a family of color schemes and consistent style. This strategy needs to be applied across the board for flyers, brochures, booklets, the website, etc. Any and all communications materials should display these simple branding elements so readers not only appreciate the breadth of information, but also begin to recognize the department's expertise and services for seniors and caregivers. Be sure to tie in your call center to your identity through the incorporation of the tagline or identity into the greeting script.

Enlist Hotline representatives to incorporate a County tagline when answering phones. Should Montgomery County adopt a tagline for senior services, the tagline should be incorporated into a welcome greeting over the phone.

Color, Design, Ease of Use, and Layout

Reduce copywriting and implement simple, consistent layouts to increase readability and effectiveness. We recommend designing materials specifically with seniors in mind, creating documents that are concise and engaging to the reader. Using bold headers, short bulleted points, pull quotes, text boxes, short vignettes, anecdotes, and more white space will help draw readers into the publications.

Allocate adequate time and resources for successful telephone response. Seniors often have a hearing loss, process information slowly, and (with more time to spare and living alone) are eager to engage in conversations. Therefore, seniors require more time per call than younger people. The County should advise providers against rushing the caller and be sure providers' compensation is not based on the number of calls, which could encourage them to be rushed and ineffective. Hire a service trained in working with seniors or conduct "senior sensitivity" training sessions.

Optimize and aggregate information on senior services into one easy-to-find and easy-to-use website. In our survey, an astounding 47 percent of Montgomery County seniors indicated they would look for information on County services for seniors on the Internet! It is incumbent upon Montgomery County to make sure that information is easy to find, comprehensive, and up-to-date. Research indicates that three clicks are the most people will utilize to find the information they seek.

Creative Concept and Suitability of the Concept for the Intended Audience(s)

Materials should stress benefits by offering real-life success stories. Undoubtedly, thousands of people have benefited from the services that the County provides. Instead of

merely explaining your programs, materials should offer testimonials that prove the merit of the services and engage the reader. Examples include using pull quotes, short vignettes, and anecdotes. Make seniors and caregivers understand some key messages: Ask for help. We understand. We can help. Building a Safe and Health Community Together. Sharing stories creates a sense of community that will draw stakeholders back to the County and its resources.

Add more bilingual publications. To reach the increasingly growing minority populations in Montgomery County, the County should produce more materials in languages including Spanish, Korean, and Vietnamese. We recognize that some materials are available in other languages on request, but we suggest taking translation a step further by using images and creative elements relative to minority audiences.

Develop peer marketing materials. Materials should be created for seniors who are using Montgomery County services and wish to share information about them with their friends.

Use multiple channels for providing information. Seniors rely on a variety of "trusted-advisors" to help make health and lifestyle decisions. As seniors age, the influence of their doctors, pharmacists, and physical therapists on healthcare decisions becomes more dominant, and the senior becomes far more dependent on the provider for guidance. Montgomery County should pursue a multichannel approach that uses these resources to spread information.

Provide support services through a toll-free number. A toll-free number can ensure that seniors are able to make contact with a live person and ask critical questions. This is especially important for conveying information about complex programs to seniors with limited cognitive abilities and/or those who need support in selecting services appropriate to them.

Provide in-depth information available through links on an easy to navigate website.

COMMUNICATIONS AUDIT APPENDIX I: DESIGN PRINCIPLES FOR COMMUNICATING WITH SENIORS

Typeface. Studies have shown that a serif typeface is easier to read in a long passage of printed text because the serif increases the differentiation between letterforms. The serifs help to guide the eyes along the line. Examples of serif fonts include Times New Roman or Garamond and Century Schoolbook. Choose typefaces based on their familiarity and legibility. The optimal type size is between 12- and 14-point for reading, while headlines and titles are typically two points larger. Drop shadows on text, often used to give the appearance of depth, can be difficult for seniors to decipher.

Type weight. While boldfaced text appears larger, readability may decrease. Limiting the use of bold to emphasize a title or a key word is recommended.

Leading. Typically, the leading (the space between each line of text) specified is two points larger than the typeface. Tight leading may cause legibility problems. Loose leading may bring benefits by creating breathing room and improving readability.

Use of all capital letters. While there is a need to delineate content from headings, the use of all caps tends to lead to higher levels of eye fatigue because of little differentiation between the letters. As an alternative, consider using bold or capitalize the first letter of each word in a heading. This provides contrast from the body copy, with increased readability. For example "What is Senior Vital Living and Why is it Important to You?" vs. "WHAT IS SENIOR VITAL LIVING AND WHY IS IT IMPORTANT TO YOU?"

Layout. Use caption copy—it tends to be highly read and remembered. Provide relevant and credible testimonials as appropriate to help illustrate key facts. Especially for the Internet, another layout trick to enhance legibility is the inclusion of a vertical bar to separate columns.

Color. Aging is accompanied by difficulty in distinguishing certain colors: blue, green, pink, and violet become difficult to identify. Pastel shades merge into a uniform halo. Declining sensitivity as the lens yellows and increases in density greatly affects color perception and sensitivity in the aging eye. It may cause images to appear as if one is looking through a yellow veil or filter. Another result is that the eye registers less violet light, which makes it easier to see reds, oranges, and yellows than it does to see blues, greens, and violets. Many people have a loss in color perception or degree of color blindness that accompanies their dimmed vision. As a result, two colors that may look very different to an individual with normal color vision may be far less distinguishable to someone with partial sight. Low contrast color combinations generally are not good choices for legibility.

In general, if you lighten your light colors and darken your dark colors, you will increase the visual accessibility of your design. For example, the complement to blue is yellow. Adjacent colors to avoid include orange and red, or blue and green, as they do not offer a

high level of differentiation to the aging eye. As an alternative, choose colors from opposite side of the color wheel.

Colors to avoid. There has been much discussion on right and wrong colors. A safe approach is to keep colors bright and bold. It is usually in the low saturation levels (very pale or very dark) that cause difficulties for users with color deficiencies. Colors that are exceptionally bright, fluorescent, or vibrant can have edges that appear to blur and create after-images, which fatigue the eye. For example, yellow text is very difficult to read. A light type color on a dark background can cause letters to appear to close in themselves. Avoid combinations of blue and yellow or red and green as many users have some degree of color deficiency or color blindness in these areas. A third issue is the use of color on color such as blue and red next to each other, which can lead to a monochrome effect. (See Lighthouse International's website for more information at http://www.lighthouse.org/color_contrast.htm.)

Avoid distracting background elements. Using any background patterns, including watermarks or embossed logos, generally is distracting and interferes with readability. As an alternative, a light complementary background color can be applied.

Balance of type and open space. Large areas of white space and small blocks of text increase readability. The results are your pages are cleaner and easier for the eye to navigate.

Paragraph alignment. Left-hand alignment offers a high level of readability as compared to justification. Justified paragraphs have all lines the same length. Forcing the line length causes irregular letter and word spacing. Centered text is best for titles or very small amounts of copy within a text box.

Contrast. The ability to distinguish lightness deteriorates as we age, increasing the need for contrast between foreground and background colors. As a rule, use dark type on light or white backgrounds. On packaging, reflective and shiny surfaces should be avoided. Moving suddenly from darkness to light, and vice versa, or from one color to another destabilizes the vision for mature consumers. It then takes some time for the eye to readjust to seeing clearly again. Changing images too fast or too frequently runs the risk of causing visual chaos.

This information has implications for television and website design. Do not plan for a television spot composed of quick-cuts or layered montages. Go for longer shots, a more linear approach, and long formats. Similarly, hearing impairment reduces the ability to hear high-frequency sounds and to discriminate words from background noise. Audio presentations need to be designed with this in mind.

COMMUNICATIONS AUDIT APPENDIX II: MEDIA HITS

To gain a clear picture of how the local media treats the Montgomery County's services for and outreach to seniors, we researched a variety of combinations of the phrases Montgomery County/Senior(s)/Senior Citizens/Montgomery County Government/ Department of Health and Human Services/HHS/Department of Recreation/Ride-On/Senior Center (as well as individual center names) in the databases of LexisNexis, and Gazette.net.

The searched yielded the following results:

LexisNexis

1. Montgomery County Government within 20 words of "Seniors" yielded 28 hits in the previous 24 months – none relevant to Senior services in Montgomery County, MD

    ▪ 22 in the Roanoke, VA Times

    ▪ 1 in Washington Post - mentions Seniors in relation to Metro seating

2. Montgomery County Department of Health and Human Services – yielded 300 total hits

    ▪ 160 hits in the *Washington Post*

    ▪ 41 in the *Washington Times*

    ▪ 22 in the *Daily Record*

    ▪ 11 *Baltimore Sun*

    ▪ 2 in the *Capital* (Annapolis)

    ▪ 1 in *Washington Jewish Week*

    ▪ 1 in *Washingtonian*

3. Montgomery County Department of Health and Human Services + Senior yielded 68 hits

    ▪ 54 in the *Washington Post*

    ▪ 7 in the *Washington Times*

    ▪ 1 in the *Capital* (Annapolis)

- 1 in the *Daily Record*

4. Montgomery County Recreation Department within 20 words of "Seniors" yielded 14 hits in the previous 24 months

  - 12 in the Washington Post (9 calendar listings, 1 service listing, 1 profile of volleyball, 1 obit, 1 irrelevant

  - 1 in Washington Jewish Week

5. Montgomery County Ride-On within 20 words of "senior" yields 2 hits

  - 2 in Washington Post describing free transit to disabled seniors and reduced fare for seniors in general

6. Montgomery County Senior Center yielded no relevant results

  - Damascus Senior Center yielded 1 Washington Post calendar listing

  - Gaithersburg Upcounty Senior Center yielded 18 hits

    o 17 in the Washington Post – all calendar/event listings

    o 1 in US States News regarding Senior Fun and Fit Fest

  - Holiday Park Senior Center – yielded 76 hits

    o 75 in the Washington Post – all calendar listings

    o 1 ABC News Transcript

  - Long Branch Senior Center yielded 75 hits

    o 54 in the Washington Post – 50 calendar/event listings and 2 please for volunteers

  - Margaret Schweinhaut Senior Center yielded 103 hits

    o 100 in the Washington Post – 98 of which are calendar/event listings

    o 1 in the Baltimore Sun

    o 1 in the Washington Times

Gazette.net

4. Montgomery County Government and senior yielded 4,823 hits

- Based on a small sampling (100 hits), about 50% are relevant hits, with 99% of them calendar and event listings

1. HHS yielded 491 results in the past 10 years

2. HHS + "senior" yielded 81 results in the past 10 years

3. Montgomery County Recreation Department and "Seniors" yielded zero relevant hits

5. Ride-On and senior yielded 4,625 hits

- Only 25% are relevant, and are generally route (passing senior centers) and fare-related

4. Montgomery County Senior Center yielded zero relevant hits

- Damascus Senior Center yielded 35,853 hits

- Gaithersburg Upcounty Senior Center yielded 2,307 hits

- Holiday Park Senior Center – yielded 7,390 hits

- Long Branch Senior Center yielded 3,290 hits

- Margaret Schweinhaut Senior Center yielded 735 hits

  o Based on a small sampling of the total results, more than 99% of the individual mentions are calendar/event listings

Summary

Montgomery County has done a good job of making use of the local media to keep citizens aware of events, programs and services through community and event calendars. Classes, seminars, and discussions for seniors appear consistently in the *Gazette, Washington Post,* and the *Washington Times*.

Additionally, the media appear to have embraced the need to raise awareness by broadcasting the County's pleas for volunteers for the Senior Sector—most noticeably for the Senior Care Ombudsman and Senior Advocacy Programs.

Finally, local media is responsive and civic-minded by sharing Montgomery County crisis assistance offerings when the metro area experiences heat waves, extreme cold spells, severe weather and the like.

However, with the breadth of services for seniors offered by Montgomery County, a multi-year media review generally should yield a significantly higher number of actual

story results. The County is not alone—this low yield is representative of many nonprofit institutions that typically lack the funding and manpower resources to adequately use the media to educate and inform the public about their services and offerings.

The major areas for improvement that the County should focus on are:

- Profile/human interest pieces

    o Identifying allies amongst the users of these services is an excellent strategy to increase coverage. Many reporters like to write human interest pieces, and providing them with subjects (seniors that have benefited from County services for seniors and improved their quality of life) would increase the likelihood of getting coverage.

- Service offerings

    o Preparing a press package highlighting all of the services (including photographs, bios of key staff and statistics) for seniors is another successful strategy the County should employ. Although the media will include events in community calendars, a larger piece detailing <u>all</u> services is not unreasonable, based on the breadth of County offerings. We envision a series that might focus on different sectors, profiling residents who have limited English proficiency for one segment, highlighting County nutrition offerings in another and perhaps housing assistance in yet another.

COMMUNICATIONS AUDIT APPENDIX III: HOTLINE USABILITY

Our Charge. As part of the development process of the Montgomery County Strategic Communications Plan for seniors and caregivers, Reingold conducted a "secret shopper" audit of the County's current phone hotline.

Our intent was to evaluate the overall customer service of the hotline, identify all the strengths and weaknesses, and to make preliminary recommendations for future management of the phone hotline. It is important to note that we focused on services and information specific to seniors and caregivers—not all services provided by Montgomery County.

Our Methodology. To recreate a typical resident experience, we conducted the audit during varied times of day via telephone. Specifically, we reviewed the Montgomery County website in the following areas of customer service and quality of information:

- **Level of customer service.** How responsive were County representatives? How long did it take to get a representative on the phone? Were representatives able to provide sufficient answers to questions?
- **Quality of information.** Where representatives able to provide accurate information to answer questions? Where questions answered efficiently and effectively? How accurate was the information provided?

Discussion of Findings

I.   Level of Customer Service

Overall, the level of customer service was excellent. With each phone call to the hotline, every representative was helpful, friendly and knowledgeable. A County representative answered all calls placed. Only one of the six phone calls was answered by the operating system and within 10 seconds a representative was on the line.

First call – representatives were busy – listened to entire voice operated system message. Within 10 seconds, connected to a MC HHS representative. Proposed a senior food and nutrition question. Representative referred me to the Nutrition department. Transferred to a Nutrition staff member who answered the question and provided phone numbers and information.

Second call – immediate pick up by representative. Asked for a list of services for seniors. Representative provided information on the Senior Resource Guide. Representative took mailing address and sent a hard copy via US mail.

Third call – immediate pick up by representative. Asked for Medicare D – Prescription Drug Services. Referenced the 1800-Medicare phone number.

Fourth call – immediate pick up by representative. Asked for senior transportation information. Very helpful representative asked qualifying questions to better respond to request for information. Provided phone numbers and descriptions for four different providers of senior transportation. Representative asked if they could send via mail a complete listing.

II.   Quality of information

Overall, the quality of information provided by County representatives was excellent. With each call, County representatives provided information accurately and efficiently.

Recommendations

One of the most valuable Montgomery County resources is the County phone hotline, which is the first place many people will look for information about senior services and programs. In addition, potential partners will use it to gather information about current programs and services. The media will also place calls to the hotline as a source for relevant articles. At the moment, the hotline is effective in projecting an excellent first impression of knowledgeable County information. Following are our recommendations for enhancement:

I. Level of Customer Service

The Hotline representatives could incorporate a County tagline when answering phones. Should Montgomery County adopt a tagline for senior services, the tagline should be incorporated into a welcome greeting over the phone.

The alternative Hotline number (240-777-4575) must be operational. Currently the phone number is always busy and does not connect to a County representative.

II. Quality of information

The customer service automated voice answering system should include office hours. With the inclusion of office hours in the automated voice messaging system, residents will understand when they are able to speak with a live person.

MALL SURVEY

Reingold surveyed 160 seniors, of whom, 75% (111) were white, 9.5% (14) were Asian American, 9% (13) were African American, 5% (8) were Latino and 1 was Native American. 13 respondents did not specify their ethnicity. The sample was thus representative of the demographics of the County's senior population. There was an even split between men and women interviewed. This report details the findings of the *Mall Intercept and Survey*.

KEY FINDINGS

- Overall, seniors have a positive view of the County and the senior services it provides.

- Although people have heard about certain services, **available services do not automatically resonate with the target audience as senior services provided by or funded through the County**. 42 percent of respondents were unaware of any County services specifically for seniors until they were prompted.

- **Senior Centers are the most widely recognized** County program provided specifically for seniors. Presented with a list of County services for seniors, 79 percent of respondents recognized Senior Centers, but they did not identify them as a County provided service without prompting.

- **Services available for active seniors (such as senior centers and transportation subsidies) are more widely recognized** than services for less active seniors (assisted transportation, adult day care services, meals on wheels).

- **Knowledge of eligibility is an important factor** in seniors' decision to use County services. Respondents indicated that they would be more likely to take advantage of a County service for seniors if they knew that it was available to them regardless of income level (79%), ability level (82%) and age (72%).

- For mobile and active seniors, messages reflecting **personal benefit, learning, and enjoyment** are likely to encourage them to use County services. Of the tested message points, the most popular terms were *Help, Benefit from, Learn,* and *Friendly.*

- Seniors are most likely to respond to **familiar** nomenclature regarding descriptors of their demographic. In the elder population within Montgomery County, transparent marketing ploys are suspect. As long as the terminology is accurate without being pejorative, condescending, or hypocritical, Montgomery County seniors prefer candor. The single most popular and widely accepted word to describe the 60-plus population was *Senior* (73%). The term *Mature* received 86 positive responses as a self-identifying adjective (54%). Of the widely used terms

we tested, the word *Aging* was the least popular, with only 23% of Montgomery County seniors choosing to identify themselves as aging.

■ As expected, *Friends and Family* are the single biggest source of information about County services, mentioned by 59% of our sample.

■ Although some bias must be assumed due to the venues where our surveys were conducted, our data indicate that outside friends and family referrals, seniors look for information about County services through the **County services and programs they are already involved in.** When asked about specific sources that they would refer to for information, 58% of respondents said they would check at the library and 55% said they would ask at their Senior Center.

■ An astounding 47% of our sample said they would **look to the Internet** for information on senior services. As expected, responses do vary based on age. 71% of respondents aged 64 or younger said they would use the Internet to find information on senior services. However, a full 44% of respondents aged 65 to 84, and 33.3% of respondents ages 85 or older use the Internet as a source of information.

■ Seniors recommend that Montgomery County look to **conventional distribution channels** such as newspapers, television, and the radio for distributing information. 46% of respondents thought that Montgomery County should advertise their services for seniors in newspapers, 13% felt the County should advertise their services on television, and 12% recommended radio.

■ **Places of worship and citizens associations** are vehicles for reaching senior audiences. 63% of our respondents are members of AARP; 60% belong to a church, synagogue, or other place of worship; and 41% belong to a community or citizens organization.

RECOMMENDATIONS

■ Montgomery County needs **to brand its services for seniors uniformly**, so that citizens of the County think of these services automatically.

■ Montgomery County should develop branding messages that **consider the activity level that each service caters to**. Language and designs should make it easy for consumers to identify the services for all ability and activity levels.

■ Montgomery County should craft messages that address the target audience using adjectives that they are familiar with and recognize.

■ Messages should entice the target audience by **emphasizing the benefits gained by participation in senior services, such as learning and enjoyment.** The

messages should also clearly and consistently define the various eligibility levels and senior qualifying age for each activity.

- Montgomery County should leverage the Friends and Family referral network by designing a plan to enlist older adults as part of the outreach network. Building on the desire of many older adults to volunteer and to solve community problems in their own neighborhoods, the County could recruit seniors as ambassadors to reach out in their own communities. One suggestion might be to host events to educate seniors and caregivers and identify individuals in each community/region who can be provided training/materials. They will become knowledgeable about the offerings available and serve as a champion to their constituents.

- Montgomery County should **leverage existing resources for message delivery**, such as libraries, community centers, and buses.

- Montgomery County should consider **strengthening existing partnerships and developing new partnerships** with places of worship and other organizations that are committed to providing services to seniors.

- Montgomery County should consider **increasing the use of print channels, if possible** and continue to distribute information about their services through some of the **print media** available in the County such as *The Senior Beacon* and *The Gazette* newspapers.

- Montgomery County should have a clear and well constructed site for senior information on the Internet. Information across all departments should be accessible from one central location that is easy for Montgomery County seniors to find and understand. For seniors, it is especially worthwhile **to consider an alias domain name or a landing page with an easy to remember name** pushed into prominence with strategic **search engine optimization**. The very high percentage of Montgomery County resident seniors age 64 and older using the web to search for senior services (47%) and an even higher number of boomers and caregivers citing the web as their source of information (71**%**), **make it imperative that Montgomery County have a site for seniors that is easy to navigate and easy to find.**

METHODOLOGY

Reingold surveyed 160 seniors and caregivers. Our responses were collected at three different malls, two restaurants, and libraries throughout the County. Our respondents were equally divided between men and women. There were 27 respondents age 64 or younger who identified themselves as caregivers, 117 respondents who were ages 65 to 84, and 15 respondents who were 85 or older. One respondent chose not to indicate his age.

In addition to a general survey conducted in English, we collected responses from senior County residents in the Asian American and Latino communities. We calculated the number of responses from non-English speakers to include in the final data analysis using the following equation:

u= Universal Set
w= White (non Hispanic) Responses
x= Spanish Responses
y=Asian (Chinese and Vietnamese) Responses
z=African-American Responses

u = w + x + y + z
w =.80u
x=.04u
y=.08u
z=.08u
w=124

According to Census data, 4% of the sample should come from our set of Spanish responses, 8% of the sample should come from our Asian American responses, and 8% of our sample should be African American. These values are equal to the percentages of the senior population in Montgomery County of Latino, Asian American, and African American descent. Because we were dependent upon the good nature and willingness of residents to be interviewed and our volunteer translators, our sample is approximate. Our final numbers represent a 9% weighted response from the Asian American community, 5% from the Latino community, 8% from the African American community, 1% Native American, and 77.5% representing white (non-Hispanic). For every demographic, we are within +/-2.5%.

Unless otherwise indicated, all percentages reflect responses to specific prompts and are the result of closed ended questions.

ANALYSIS

Knowledge of County Services for Seniors

We tested the general awareness of County services by asking respondents to list the services for seniors that they were aware of. While the majority of respondents knew of some of the County's senior services and viewed them positively, 42% of respondents were unaware of any County services specifically for seniors until they were prompted. After being prompted about particular services, respondents were generally familiar with several programs for seniors. **This response pattern indicates that although people have heard about certain services, they do not automatically resonate as senior services provided by the County.** After being prompted, respondents were more familiar with county services for seniors.

When asked about specific services, Senior Centers are the most widely recognized service provided specifically for seniors. We tested knowledge of particular services for seniors by naming the service and asking respondents if they are familiar with it. Senior Centers are the best-known services from the tested list, with 79% of respondents indicating that they do know about senior centers. Other well known services are nutrition services (51%) and escorted transportation (47%); however, neither of these is as widely recognized as the Senior Centers.

Generally the services for active seniors are more widely recognized than services for less active seniors or those constituents who might need greater amounts of care and attention. While Senior Centers and Escorted Transportation had relatively high levels of recognition, 79% and 47% respectively, services such as personal care services (26%), adult day care subsidies (21%), and respite care (19%) had very low levels of recognition.

Recommendation: Montgomery County needs to brand its services for seniors uniformly, and across all media so that citizens of the County think of turning to the County for these services when the need arises. A strategic visual identity/tag that is universal will go far in helping confer the goodwill and awareness of popular and recognized County sponsored programs and activities to those less visible. When applying this brand, Montgomery County should consider the activity level and eligibility that each service caters to, and make it easy for consumers to identify the services for all eligibility and activity levels.

Messaging and Incentives for Use

Knowledge of eligibility is a strong factor in seniors' decision to use County services. We asked seniors about three factors that often affect eligibility: income level, level of physical ability, and age. In each instance most respondents indicated that they would be more likely to take advantage of a County service for seniors if they knew that it was available to them regardless of income level (79%), ability level (82%) and age (72%).

A whopping 79% of seniors expressed surprise that County services were available to citizens even if they were not poor/indigent and felt they would be more likely to access those services knowing that. Ironically, most seniors also indicated that they would be inclined to use services for seniors if they knew that they were free; however, of those who disagreed with this statement a significant number expressed hostility to the suggestion that County services were ever free, saying that they would pay for the services through increased taxes. In response, we recommend marketing services as being available "at no cost to residents."

Messages reflecting personal benefit, learning, and enjoyment are likely to be more effective in encouraging seniors to use County services. We tracked respondents' reactions to particular messages by asking them to respond to a list of words. Although the responses varied significantly, we were able to infer patterns of preference. The most popular words from our list were *Help, Benefit from, Learn,* and *Friendly.* Interestingly, words conveying similar messages were less popular. For example, *Benefit from* and

Learn were both popular messages conveying a sense of personal growth. *Develop* conveys a similar message but was most unpopular among our respondents. *Enjoy* and *Affordable* were also selected by over half the sample as qualities they would find appealing when considering a program.

Surprisingly, the concept of *Safe* doesn't seem to draw seniors in, perhaps because they assume that County-sponsored activities/programs would naturally be safe. Furthermore, *Experience* didn't resonate with Montgomery County seniors in our sample. Barely one-third are looking for new experiences from the County.

Seniors are likely to respond to taxonomy and adjectives with which they are familiar. We explored opportunities to develop a new idiom around senior services by asking respondents to react to a list of descriptive words. The single most popular and widely accepted word to describe the 60-plus population was *Senior* (73%). The term *Mature* received 86 positive responses (54%) as a self-identifying adjective. The remaining terms in our list received positive responses from 41% of the sample or less. This response pattern indicates that our target audience responds well to familiar terminology.

Recommendations: Montgomery County should craft messages that seniors will identify with. Messages should address the target audience using adjectives that they are familiar with and recognize, and should entice the target audience by emphasizing the benefits gained by participation in senior services, such as learning and enjoyment. The messages should also clearly and **consistently define the various eligibility levels**.

Distribution Channels

We explored distribution channels from several different angles. We learned about a broad range of options for message dissemination by asking our respondents where they thought Montgomery County should advertise its services for seniors. We then homed in on particular distribution channels that have proven to be effective for other programs and campaigns.

Seniors look to conventional distribution channels such as newspapers, television and the radio. Of our 160 respondents, 122 shared their thoughts about distribution channels. 46% of respondents thought that Montgomery County should advertise its services for seniors in newspapers; *The Gazette* (10%), *The Senior Beacon* (5%), and *The Washington Post* (5%) were the most popular papers. The strong showing for *The Gazette* and *Senior Beacon* vis-à-vis *The Washington Post* is good news for budgeting purposes. Of these, *The Washington Post* and the *Gazette* are the most widely read. Relatively few respondents thought the County should advertise its services for seniors on television (13%) and on the radio (12%). Although advertising can be expensive, **news articles on senior services (earned media) are free and have the added benefit of credibility and personalization through storytelling.** This represents a prime outreach opportunity for the County.

Seniors look for information about County services through the County services and programs they are already involved in. Libraries (16%) and Senior/Community Centers (8%) were both cited as places where Montgomery County should advertise their services for seniors. Furthermore, when we asked respondents about specific sources that they refer to for information, 58% said they would check in a library and 55% said they would ask at their Senior Center. This bolsters the recommendation that the County should work with other for profit and nonprofit groups already providing services to seniors to raise awareness. Other popular points of reference included family and friends (59%), and the Internet (47%).

Places of worship, and citizens associations are vehicles for reaching senior audiences. We asked our respondents about the groups and organizations that they participate in and received a variety of responses. In general, places of worship and citizens organizations are strong ways of reaching out to seniors. Sixty-three percent of all respondents are members of AARP; 60% belong to a church, synagogue or other place of worship; and 41% belong to a community or citizens organization. Alternatively, civic groups (such as Lions and Rotary) fare poorly among Montgomery County seniors, as a scant 11% report membership. Of the seniors who belong to any groups and organizations, 36% attend meetings frequently (three times or more in a month), and 70% read their organizations' newsletter most of the time or always.

Recommendation: Montgomery County should consider increased message delivery through its own resources and facilities such as libraries, community centers, and buses. The County should also consider strengthening existing partnerships and developing new partnerships with places of worship and other organizations that are committed to providing services to seniors. It will also significantly broaden Montgomery County's reach to identify champions in community sectors to serve as advocates and reliable sources of information on County programs/activities for seniors. Montgomery County should continue to distribute information about its services through some of the print media available in the County such as *The Senior Beacon* and *The Gazette* newspapers.

MALL SURVEY APPENDIX IV: RESULTS

Demographic Information

Age Range	Number of Responses	Total Sample	Percentage
64 or younger	27	160	17%
65 – 84 years old	117	160	73%
85 or older	15	160	9%
Unreported	1	160	1%

Gender	Number of Responses	Total Sample	Percentage
Male	80	160	50%
Female	80	160	50%

Ethnicity	Number of Responses	Total Sample	Percentage
African American	13	160	8%
Asian American	14	160	9%
Hispanic/Latino	8	160	5%
Native American	1	160	1%
White	111	160	69%
Other	13	160	8%

Knowledge of County Services for Seniors

Service	Number of Responses	Total Sample	Percentage
Senior Centers	127	160	79%
Nutrition services, including home delivered meals	82	160	51%
Escorted transportation	75	160	47%
Mental health services	59	160	37%
Volunteer Center	50	160	31%
Telephone information and assistance	45	160	28%
Personal care services (bathing, meal preparation)	41	160	26%
Subsidies for adult day care services	33	160	21%
Respite care	30	160	19%

Language and Messages

Adjectives for the Aging Population	Number of Responses	Total Sample	Percentage
Senior	116	160	73%
Mature	86	160	54%
Experienced	65	160	41%
Older Adult	64	160	40%
Elderly	39	160	24%
Seasoned	38	160	24%
Aging	36	160	23%
Silver	22	160	14%
Golden	22	160	14%
Boomer	16	160	10%
Platinum	9	160	6%

Terms to Encourage Use of Senior Services	Number of Responses	Total Sample	Percentage
Help	95	160	59%
Benefit from	93	160	58%
Learn	93	160	58%
Friendly	91	160	57%
Enjoy	87	160	54%
Affordable	84	160	53%
Participate	74	160	46%
Neighborly	69	160	43%
Connect/Socialize	60	160	38%
Experience	56	160	35%
Safe	54	160	34%
Develop	46	160	29%

I would be more likely to take advantage of a county service for seniors if I knew that:	% Disagree	% Somewhat Agree	% Agree
It was available to all seniors, regardless of income.	10%	11%	79%
It was available to all seniors, not just the disabled.	8%	10%	82%
It was available to residents over 60, not just those over 75.	14%	13%	73%
It was free.	10%	10%	80%

Distribution Channels

Common Sources of Referral	Number of Responses	Total Sample	Percentage
Friends/Family	95	160	59%
Library	93	160	58%
Community Centers	88	160	55%
Internet	75	160	47%
Newspapers	68	160	43%
Other	58	160	36%
Posters in restaurants, community centers, etc.	46	160	29%
TV	45	160	28%
Newspaper Ads	43	160	27%
Flyers	39	160	24%
Radio	38	160	24%
Direct mailings	34	160	21%
Coupons	27	160	17%
Emails	20	160	13%

Groups and Organizations	Number of Responses	Total Sample	Percentage
AARP	101	160	63%
Church, synagogue, place of worship	96	160	60%
Community citizens associations (home owner's association or neighborhood watch)	66	160	41%
Alumni association	38	160	24%
Health club	30	160	19%
Civic group (Lions, Rotary, Optimist)	18	160	11%
PTA	5	160	3%
Other		160	0%

Respondents Suggested Distribution Channels		Number of Responses	Total Sample	Percentage
Newspapers	TOTAL	73	160	46%
	General (no specification)	17	160	11%
	Gazette	16	160	10%
	Senior Beacon	8	160	5%
	Washington Post	8	160	5%
	Local	7	160	4%
	Other	5	160	3%

Libraries		26	160	16%
TV		20	160	13%
Radio		19	160	12%
Senior Centers		12	160	8%
Malls		8	160	5%
Grocery stores		7	160	4%
Internet		7	160	4%
Places of worship		6	160	4%
Community centers		6	160	4%
Senior communities		5	160	3%
Direct mail		5	160	3%

FOCUS GROUP REPORT

Reingold recruited 16 participants for the senior-centered focus group from the Holiday Park Senior Center and the international food store in Rockville. The caregiver focus group was composed of six people who were recruited from caregiver support groups at the Holy Cross Hospital Caregiver Resource Center. This report highlights the main findings of the focus groups and makes recommendations based on these findings.

METHODOLOGY

Reingold conducted two focus groups with two specific sets of constituents; seniors and caregivers. The senior-centered focus group was conducted at Holiday Park Senior Center. We recruited participants while conducting random intercept surveys at the international food store in Rockville and at Holiday Park Senior Center.

The caregiver focus group was conducted at the Holy Cross Hospital Caregiver Resource Center in Silver Spring. We recruited participants from several different support groups for people caring for family members with Alzheimer's disease. One-third of the participants had also been caregivers to people with conditions other than Alzheimer's.

Not surprisingly, there was an overlap between these two categories. Most of the members of the caregiver focus group are also senior citizens residing in Montgomery County, and some members of the senior focus group are caregivers to invalid family members.

In open discussions, we asked 16 seniors and six caregivers about their experiences in using Montgomery County services specifically for seniors and caregivers. The senior focus group was composed of six women and ten men, all of whom were white. The participants in the caregiver focus group were all women. Half were caregivers to their spouse, and half were caregivers to one or both parents. Four participants were white, one was African American and one was Latina.

 We discussed issues such as:

- Motivation to use a County service
- Messages
- Materials and Formats
- Distribution Channels

MOTIVATION TO USE A COUNTY SERVICE

Services for Seniors

Seniors expressed an interest in using County services that grant them a sense of purpose. In their comments there was a recurring theme of isolation and loss of identity

or social value after retirement. Participants in the senior focus group use County services that allow them to socialize and maintain their sense of self-worth.

"We used to have it, when we worked. I'm a retired lawyer and I used to have an identity. I used to have self-respect. Now my self-respect is coming to this group and looking at you [another senior] and you're not around all the time."

Seniors who do not use County services associate them with the stigma attached to the process of aging. Participants discussed the stigma attached to seniors and disabled people, saying that people who are not familiar with the services available through the senior centers sometimes choose not to make use of services for active seniors because they think of them as places for the physically and/or mentally disabled. The seniors who do use County senior centers appreciate the opportunity to be around other active seniors.

Active seniors who use senior centers are unaware of other County services. Although the seniors who participated in the focus group were active members of the Holiday Park community, they had little knowledge of services available to seniors that were not available through Holiday Park. Those participants who were familiar with other services for seniors learned about them through necessity. They had made use of services such as Meals on Wheels, respite care, and home care services. Several respondents noted that they do not pay attention to available services until they needed them. This sentiment was confirmed in the caregiver focus group.

Services for Caregivers

The main factor motivating caregivers to use County services is necessity. Caregivers explained that they did not look into County services for seniors until their family was in a state of crisis.

Caregivers have difficulty accessing services. Throughout the session there was a refrain of frustration about access to services. Although most of the participants were familiar with some services for seniors and caregivers, they found that they were either ineligible, or that they received conflicting information about the services from different providers. One caregiver explained how in her search for housing for her 80-year-old mother she was referred to the Housing Opportunity Commission by the "Commission on Aging." However the Housing Opportunity Commission could not help her without extensive documentation. They referred her back to the "Commission on Aging" for a list of documents and eligibility requirements. Ultimately, she was unable to obtain a full list of the documents she would need from either the Housing Opportunity Commission or the "Commission on Aging," and became trapped in a cycle of referrals. Focus group participants indicated that they had experienced similar situations with regard to accessing information and applying for services.

Caregivers opt out of County services that require lengthy and frustrating application processes. When caregivers found themselves and their families in a state of crisis, they went through various channels to investigate County services. Crisis-driven

searches are initiated through front line information services such as the telephone and the Internet. Strong customer service and user-friendly formats are essential in these areas.

Once caregivers have adapted to their situation they begin to look for information in new venues such as seminars and health expos. Unfortunately, **County events that would be of interest to caregivers, such as health expos and seminars, are often held during office hours** when people are unable to attend. Ultimately, many caregivers decided not to use County services because of frustrating application processes, inconsistent information, and a lack of opportunities to meet with County representatives. Caregivers reported unresponsive staff, an inefficient information and referral system, and an inability to access basic information such as eligibility and cost for services. They expressed particular enmity towards the aging services automated telephone system.

> *"I kept asking for a list of County housing opportunities for seniors and there was ambiguity there about which facilities were owned by the County and which were not. I did identify a place and then I had difficulty with the forms. Each time I went back they said, 'Oh, but you also need . . . '"*

Although most participants have a positive view of the County and its senior services, the County's ability to deliver services to all of its residents was an issue of concern in both focus groups. Participants felt that often the County's customer relations was of a poor standard and worried that this reflected a similar lack of quality in program delivery.

Recommendations

Montgomery County needs to brand its services for seniors uniformly so that seniors and caregivers are familiar with the continuum of services available to all seniors as they age.

The County should improve communications among all agencies and departments that provide services to seniors. This could be accomplished by developing a mechanism to establish and facilitate greater coordination and collaboration across the County's many senior programs.

Furthermore, the County needs to improve outreach to seniors and caregivers through its existing networks. The County should also make a concerted effort to raise awareness about services for less active seniors so that caregivers and seniors know where to look for those services before they are in a state of crisis.

MESSAGES

The Word "Senior"

A few participants did not like the term "senior," associating this term with disability. Participants did not want to be seen as inactive or burdensome. They said that messages should emphasize vitality and health and suggested the use of testimonials or anecdotes that highlight such experiences. They suggested terms such as "mature" or "older person" as alternative labels, and even proposed discontinuing age-based labels in favor of new labels based on level of activity or mobility.

"I don't like the word senior because to me, if I think of that, I think of someone on their last legs just sitting around in a wheelchair. I think people associate that and they need to understand there are a lot of viable seniors too."

Yet **the vast majority of participants still felt that "senior" is the most effective term** to describe their demographic, as it is a familiar word that is often associated with benefits such as senior discounts.

"Senior is priceless because it has a well billed meaning by now; it assigns the senior discount. I mean, it all falls into place with the word 'senior.'"

One of the most revealing points raised in this conversation was the lack of consistency in the definition of the term "senior." Many people who use Montgomery County services for seniors are confused by different ages of eligibility and conflicting definitions of "senior." They felt that whatever term Montgomery County uses to brand its senior services should be consistently defined by service providers and departments.

"The one question I've got is, 'What is a senior? Is it 55 is it 60 is it 65?' It's defined by different organizations and it's different throughout the area."

Messages for Active Seniors

As we have already discussed above, active seniors do not want to be seen as burdensome. Seniors are likely to respond to messages that re-affirm their sense of self worth and focus on their experience, wisdom and the value that they bring to society. Messages that could encourage seniors to use County services include:

- Messages that emphasize vitality and health garner positive reactions from seniors
- Messages that emphasize opportunities to share knowledge and experiences by volunteering or teaching
- Messages prompting seniors to be productive or do something new
- Messages that encourage interaction with peers

Messages for Caregivers

Overall, caregivers emphasized the importance of the service over the general marketing message, saying that they go out looking for services, support, and assistance and do not need to be convinced of the value of a service that can help them take care of their invalid loved one. They emphasized the importance of effective service and improved information dissemination over specific messages.

Recommendations

Whether or not Montgomery County continues to use the term "senior" to describe the over-60 demographic, the County should clearly define the term in all of its communications so that residents are fully aware of their eligibility for services.

Montgomery County should develop branding messages that consider the activity level that each service caters to. Language and designs should make it easy for consumers to identify the services for all ability and activity levels.

The County should also craft messages that enhance seniors' sense of self-worth and value in society. Messages that focus on seniors' ability to give back to society are likely to encourage active seniors to take part in County services.

SYSTEMS, MATERIALS, AND FORMATS

Participants in the senior focus group indicated that they prefer to get information through a trusted source, and they like to have a conversation about the services being recommended. However, they do not trust the County information and referral system because they believe it is difficult to reach a "live voice" and often operators are not knowledgeable about senior services. Effective materials will include information cards and other portable tools that an employee at a senior center or library can easily explain.

"Is there a place we could visit, and talk to a live person face-to-face and find out what we want?"

Caregivers agreed that a one-on-one conversation is the preferred method of communication. They expressed frustration with the County's automated telephone system, explaining that their schedules do not allow them to wait on hold for extended periods of time, nor are they able to accept unscheduled calls when County representatives are able to return their call. They expressed a desire to have an appointment system through which they could call and make an appointment to speak to a responsive, informed County representative.

"Punch one, punch two, punch three—it's never what you're looking for and it's infuriating sometimes!"

In both focus groups, participants expressed a desire to have a single, user-friendly source of information covering all senior services. They mentioned the *Montgomery County Seniors' Resource Guide* published by *The Beacon.* Interestingly, the participants who knew about this guide felt that it was a very useful tool; however, a significant number of participants had never seen or used the guide. Improved distribution of this resource will be essential.

Furthermore, participants in the caregiver focus group felt that the *Montgomery County Seniors' Resource Guide* is difficult to navigate and asked for better categorization and formatting. Caregivers were also interested in other formats, such as telephone lists that can be posted on a refrigerator or next to a telephone, and a single-page resource with information about all of the County departments that they may need ranging from Health and Human Services to Legal Aid.

Recommendations

Montgomery County should make an effort to streamline its information and referral system by training staff members to be fluent in all programs available to seniors and caregivers—through all County departments as well as their own.

The County should continue to produce the *Seniors' Resource Guide* and consider a more user-friendly format and increased coverage of the services available to seniors.

DISTRIBUTION CHANNELS

One-on-one conversations are the preferred method of information gathering among seniors and caregivers alike. Both sets of constituents are likely to approach a trusted organization for information and referral. Senior centers, libraries, pharmacies, churches, and synagogues were all mentioned as common places of referral. Providing information to these organizations is likely to be an effective method of promoting Montgomery County's services for seniors.

Seniors are likely to take advantage of County services when they receive direct referrals from their peers, friends, or family members. Personal stories and experiences encourage seniors to take advantage of County services. Identifying and training active and engaged seniors to be spokespeople would be an effective method of promoting County services for seniors. Seniors were also interested in the idea of educational presentations at senior centers and other venues, such as libraries or community centers, to provide information on available services and programs.

Because seniors and caregivers appreciate one-on-one interactions**, a crucial step in Montgomery County's continued outreach to seniors will be the cultivation of knowledgeable, welcoming staff, trained in customer service.** Staff at all points of entry into the County system should have some knowledge of the network of senior services available and should be able to field inquiries about various topics.

Seniors and caregivers alike frequently look for particular services. One respondent captured this attitude clearly saying, "A lot of programs zero in on a need. When you need it, find it." This indicates that there is not a general knowledge of County services for seniors.

Increasing the overall visibility throughout the County could increase awareness about County services for seniors. Focus group participants mentioned conventional distribution channels such as newspapers (*The Washington Post, The Senior Beacon, The Gazette)*, television, and street-side banners. Furthermore, the County can take advantage of its audience's inclination to "look for" services by categorizing their services intuitively and promoting them in common reference resources such as telephone books and the Internet.

Recommendations

Montgomery County should leverage the friends and family referral network by inviting older adults to act as County representatives and promote senior services in their communities. This tactic would raise awareness about County services among seniors and create an opportunity for seniors to give back to their communities.

Montgomery County should leverage existing information dissemination networks by training staff in senior centers and libraries to provide information about other County services. The County should develop materials to support staff in their referral efforts and consider distributing information on buses and in senior housing developments.

Because caregivers are inclined to search for services, the County could benefit from advertising services in commonly used reference materials such as the telephone book and Internet.

PARTNERSHIPS

Fourteen representatives from organizations and civic groups that have worked with Montgomery County to provide services to seniors were interviewed. Of these, four people represented organizations that provide services to seniors from ethnic minority populations.

KEY FINDINGS

■ **The partnerships in this study fell into two broad categories: formal (eight) and informal (seven), with one organization's partnerships falling into both categories.**

■ **Formal partnerships typically emerge when the County issues a request for proposals** inviting organizations to compete for grants or offering the opportunity to implement particular programs for seniors. **Informal partnerships are developed with volunteers, civic groups and members of County commissions.**

■ **Montgomery County's ability to provide supplemental funding for programs is frequently cited as one of its greatest strengths.** Private sector and non-governmental organizations feel that by working with the County they can implement programs on a much greater scale than they might otherwise be able to. **However, the slow bureaucracy that governs the County grant-making process frustrates partners.**

■ **Informal partners are often motivated by personal experience.** Volunteers and individual members of commissions are often recently retired individuals who wish to improve County services for seniors so that the needed services are functioning and in place when they and their cohort need them. Others have seen or experienced the challenges of aging in a family member or friend. Formal partners are generally driven by the chance to increase their effectiveness and gain leverage through their affiliation with Montgomery County.

■ **Private sector and nongovernmental organizations are able to deliver programs that target specific populations,** while the County has a broader outlook.

■ **Partners' satisfaction with the County's communications efforts varies considerably.** Some partners feel discouraged and "out of the loop" when the County has not provided information about its programs to them. Others praised the County's communications efforts.

■ **The majority of partners felt that occasional in-person conversations are absolutely necessary.** The partners who are most satisfied with the County's

communications efforts were able to name a specific person to whom they can always go with issues or concerns.

- **Even those respondents who have a good relationship with a County representative sometimes expressed a desire for information beyond what is currently available through the County.** Many of them suggested developing electronic communications tools, such as senior services message boards that can be continuously accessed and updated.

- **Ten out of 14 respondents suggested that there is a need for improved internal communications within County government.** Partners reported that when there is staff turnover, new staff are not introduced to partners, communication is not maintained and initiatives suffer.

- **The County loses out on opportunities to develop new partnerships because it does not engage partners socially.** The County and its partners could benefit by meeting together and discussing initiatives on the full range of topics applicable to seniors.

- Several partners were **frustrated by the lack of follow through** on particular projects. They felt that County partners had high expectations in the conceptual stages of a project but did not share in the staffing or administrative requirements necessary to implement such large projects. Half of the respondents representing formal partnerships felt that the County was often too short-staffed to assist in the management of a project or program that they had conceived; realize the full potential of an existing County program; or manage the bureaucratic side of a project so that the program could be properly implemented. (See page 54.)

- Many partners felt that the strength of the County's programs for seniors is compromised by **competition for limited funding and a lack of strategic communication between programs.** (See page 55.**)**

- **All representatives from organizations that serve seniors with special needs expressed frustration with the County's efforts to reach their constituents.** (See page 56.)

RECOMMENDATIONS

- **Montgomery County should consider implementing an informal networking program such as a monthly breakfast.** Representatives from all senior services could be invited to attend and informally discuss new opportunities and initiatives.

- **The County should consider developing an orientation package for new staff.** This tool would introduce new staff to the County's services for seniors and those

of major partners. It would enable new staff to absorb important information about the structure of service delivery to seniors and existing partnerships.

- **Establish a mechanism for improving coordination of senior services programs**: This mechanism would establish and facilitate greater coordination and collaboration across the County's many senior programs, leading to the development of a common identity and consistent message for information directed toward seniors and their caregivers and improved quality assurance for senior services.

- Montgomery County should **develop user-friendly timelines and tools for its partners that explain the County's RFP process and how to implement programs within the confines of the County's budgetary requirements.**

- The County should also consider adopting a policy of enacting **continuing resolutions in advance of each new fiscal year.** This would sustain the flow of funding to County departments and partners so that they could continue operating until the completion of regular appropriations.

- Because some segments of the population feel disenfranchised—to the point of feeling disrespected—those in charge of outreach to seniors need to go the extra mile to ensure clear communications with those populations. Our survey found the deaf and Latino communities are particularly sensitive to a perceived lack of attentiveness. **The County should develop comprehensive tools to train their staff in meaningful cultural competency** and be more receptive to its partners' recommendations for addressing cultural competency issues.

- **The County should consider developing e-tools to bolster communications with partners.** Online newsletters, listservs, and news-feeds are all quick, cost effective ways to share information. The County could also develop a short training tool to introduce less tech-savvy staff to the new tools.

- **The County should take advantage of a variety of new partnership opportunities with both private and nonprofit service providers that would lead to:**

  - Improved information and referral systems
  - Improved online outreach and cross-linkages
  - Opportunities to reach constituents through direct mail
  - Opportunities to place advertisements in the popular *Beacon* newspaper

METHODOLOGY

Fourteen representatives from a range of organizations and civic groups that have worked with Montgomery County to provide services to seniors were interviewed. Of these, four represented organizations that provide services to ethnic minority seniors. Interview

subjects were selected from the list of participants in the Senior Plan Advisory Committee from Phase I of the Senior Strategic Plan. We conducted interviews by telephone, and subjects who requested it were promised anonymity.

In collaboration with representatives of Montgomery County, Reingold developed an interview guide that served as the basis for the interviews and probed areas such as:

- Motivation to engage in a partnership with the County
- Benefits of partnerships to Montgomery County
- The strengths and weaknesses of the County as a partner
- Opportunities for future partnerships

MOTIVATION TO ENGAGE IN PARTNERSHIPS WITH THE COUNTY

In general, Montgomery County's partnerships fall into two broad categories: formal (eight) and informal (seven). One organization has partnerships that fall into both categories.

Formal partnerships are typically formed with private sector and nongovernmental organizations to develop and implement programs for seniors. These partnerships typically result when the County issues a request for proposals that invite organizations to compete for grants or offer the opportunity to implement particular programs for seniors. Frequently, a partnership will begin in this way and evolve into a less formal partnership in which the County and the partnering organization share information and resources more freely.

Informal partnerships are developed with volunteers, civic groups, and members of County commissions who advise the County on the kinds of programs that are needed. This type of partnership relies on the initiative and tenacity of the volunteers.

In both formal and informal partnerships, the main motivation for individuals and organizations to enter into a partnership with Montgomery County is the desire to improve programs and services to seniors. There are, however, some distinctions between the two types of partnerships.

Informal partners are often motivated by personal experience. Many volunteers and members of commissions are recent retirees who wish to improve County services for seniors so that the needed services are functioning and in place when they and their cohort need them. Others have experienced the challenges of aging by a family member or friend.

Formal partners are generally driven by the leverage they gain from being affiliated with Montgomery County. The additional financial resource the County provides enables them to provide more or higher quality service. Having partnerships with the county provides greater visibility and implies an endorsement of their services.

Organizations also enter into partnerships with the County because they wish to improve service delivery and need financial support to do so.

BENEFITS TO MONTGOMERY COUNTY

Montgomery County benefits from partnerships with private sector and nongovernmental organizations, as well as individual volunteers, in several ways.

Private sector and nongovernmental organizations can help the County deliver services that are focused on a particular issue or concern to certain seniors. They also bring expertise in specific areas and the ability to deliver services that are more focused. For example, the Alzheimer's Association provides a wide range of services for people dealing with issues of Alzheimer's disease, while the County cannot devote the same amount of time and energy to this single concern.

"We are an extension of the County service to this target population."

Individual volunteers provide the County with valuable labor and expertise. Volunteers also are able to reach out into their own communities and gauge reactions to the County's ability to deliver services to seniors. They bring valuable feedback, make recommendations, and even work to implement new policies and programs for seniors. **An often-overlooked value of volunteers is their ability to carry and disseminate messages back into their various communities.**

MONTGOMERY COUNTY AS A PARTNER

Many respondents indicated that they enjoy working with Montgomery County and hope to expand their existing partnerships. All respondents felt that there were areas where the partnerships could be improved; several interviews raised recurring themes.

Interdepartmental Knowledge and Institutional Memory

Although most respondents appreciate the opportunity to partner with Montgomery County, **10 out of 14 respondents suggested that there is a need for improved internal communications within the County**. Partners who have worked with the County for several years, and those who have worked on multiple programs, all indicated that programs run more smoothly when there is **a person assigned responsibility for a particular program or initiative**. Transitions are particularly hard. Partners feel that when there is turnover, new County staff do not receive adequate orientation about the partnership and are not properly introduced to their partners. Communication breaks down and initiatives suffer because often new staff are not invested in the program or partnership or do not know enough about it to be effective.

Many partners feel that the strength of the programs they offer with the County is compromised by **lack of internal communications among County departments.**

Furthermore, respondents feel that **the County misses opportunities to develop new partnerships and streamline programs because it does not engage partners "socially."** They believe the County and its partners could benefit by meeting together and discussing initiatives and opportunities on the full range of topics applicable to seniors. They could benefit from one another's experience.

Recommendation: Montgomery County should consider implementing an **informal networking program, such as a monthly breakfast**. Or if a monthly breakfast program has been created, the County should ensure that representatives from all senior services attend this networking breakfast and informally discuss new opportunities and initiatives. A program such as this would help keep the County and its partners aware of new opportunities. It also would improve the information and referral system within the County and between partners by making providers aware of services available through other organizations and agencies. Inviting the County Executive to attend once a year would highlight the importance of the networking effort and underscore the County's commitment to serving the senior population.

The County should also consider developing an orientation package for new staff. If an orientation has already been developed, a thorough review of the content and format would be recommended. The orientation should introduce new staff to all of the County's services for seniors and major partners. It would enable new staff to absorb important information about the structure of service delivery to seniors and the array of existing partnerships.

Initiative and Follow Through

Many partners expressed a great deal of respect and appreciation for the dedication of the County's program staff and their interest in delivering outstanding services. At the same time, **several partners were frustrated by the lack of follow through on particular projects.**

"The chief strength of the County is its potential. There are a million ways it could leverage these kinds of partnerships to achieve its goals. The weakness is that it doesn't always take advantage and that has to do with who has the time and energy and inclination to do it. There needs to be somebody making a priority of this to maximize that strength."

Quality of Programs vs. Quality of Service

"It's always harder to find the strengths than the weaknesses. My general feeling is that the County has a proactive approach to things. They don't always follow through with some of the ideas though."

Many respondents felt that the County's greatest strength is the quality of its programming for seniors. The County's dedication to providing quality services makes it a good partner for people who are equally passionate, but departmental isolation and

competition for program funds can create internal competition. Many partners feel that the strength of the programs they offer with the County is compromised by **lack of internal communications between County departments.** Partners suggested the possibility that an innocent breakdown in communication sometimes conceals a subconscious desire to sabotage competing programs, especially when individual County programs compete for the same budget dollars each year.

For example, a County partner was glad to hear of an increase in the use of the Meals on Wheels program in a rural region of the County until she heard that shortly after this increase, the nutrition program at a the local senior center was forced to close because attendance had dropped significantly. When the individual asked the Meals on Wheels representative if there could be a connection between these two developments, she sensed hostility. A potentially competitive environment could be replaced with a cooperative one through the re-establishment of networking breakfasts and the establishment of a single point of contact.

Recommendation: **Establish a mechanism for improving coordination of senior services programs**: This mechanism would establish and facilitate greater coordination and collaboration across the County's many senior programs, leading to the development of a common identity and consistent message for information directed toward seniors and their caregivers and improved quality assurance for senior services.

Financial Relationships

Montgomery County's ability to provide funding for programs is frequently cited as one of its greatest strengths. Private sector and nongovernmental organizations feel that with financial support from the County, they can implement programs on a much greater scale than they otherwise could. Volunteers working on County commissions appreciate the opportunity to improve services for seniors by making budgetary recommendations.

However, partners also feel discouraged about the financial component of their partnerships. They are often frustrated by the ambiguous requirements of the bureaucratic process and feel thwarted by the County's budgetary timeline, which impedes program delivery over a full 12-month period.

"It takes a long time to get the documents through the bureaucratic and legal channels. I respect the process, but it would be nice if it took two weeks and not two months. The major reason is that if we can't start a program in July, we have to wait until September. If we haven't spent funds by June 30th it goes away, so we have a 10-month window, not a 12-month window, to do the work."

Recommendation: Montgomery County should continue providing nongovernmental organizations with grants and financial support and **develop a more streamlined RFP process and clear, concise instructions to help partners plan and implement their programs within the confines of the County's budgetary requirements.**

The County should also consider adopting a policy of enacting continuing resolutions in advance of each new fiscal year so County departments and partners can continue operating until the completion of regular appropriations.

Programming for Special Needs Residents

All representatives from organizations that serve seniors with special needs expressed frustration with the County's efforts to reach their constituents. Representatives from organizations that work with non-English speaking Asian Americans applauded the County's efforts to reach their constituents, but expressed frustration at the lack of funds and labor hours required to translate the County's information.

Conversely, representatives from organizations that serve primarily Latino seniors and the visually and hearing impaired (including the culturally deaf) feel that there is a lack of interest in improving communication with their constituents.

> *"Honestly, the first thing is to have staff that understand the community. . . . The training is too much on the surface; what you need is [for staff] to* want *to understand the difference."*

Recommendation: **The County should develop comprehensive tools to train its staff in cultural competency** and to be more receptive to partner recommendations for addressing issues of cultural competency. Tools could include facilitated training sessions and role-playing.

The County should develop tools in key non-English languages and for the visually and hearing impaired, with designs and language that are vetted through their partners that serve those special needs groups.

Communicating with Partners

Partners' satisfaction with the County's communications efforts varied considerably. Some partners felt discouraged and "out of the loop," while others praised the County's communications efforts. Despite this range in responses, we were able to identify certain common trends and preferences among most partners.

The majority of partners feel that occasional in-person conversations are absolutely necessary. Generally the partners who are most satisfied with the County's communications efforts were able to name a specific person who they can always go to with issues or concerns. They feel that their point-person is responsive and engaged. Partners who are less satisfied with the County's communications feel lost in the system and do not always know whom to approach with their comments or concerns.

Even those respondents who have a good relationship with a County representative sometimes expressed a desire for more information than what is currently available

through the County. Most partners are excited by the idea of a senior services newsletter or message board. Although partners want to take advantage of electronic communications tools, they are concerned that County program staff would be slow to adopt these new tools and disinclined to use them.

Recommendation: As discussed above, the County should consider hiring a senior services liaison that would be responsible for managing internal communications regarding senior services. The County also should devote resources to a quarterly networking breakfast.

In addition, the County should consider developing e-tools to bolster communications with partners. Online newsletters, listservs, and news-feeds are all quick, cost effective ways of sharing information. The County could also develop a short training tool to introduce less tech-savvy staff to the new tools.

PARTNERSHIP OPPORTUNITIES

Montgomery County can certainly expand outreach to seniors and caregivers and improve programs by leveraging existing partnerships. There is something to be gained on both sides of this equation. Research in Phase I of the "Imagining an Aging Future for Montgomery County" project identified the desire of Montgomery County seniors to become active volunteers. Because these seniors are stakeholders and extensions of the County's expertise, involving them as ambassadors in an active "peer volunteer" campaign makes good sense. The RSVP program run by the County Volunteer Center could benefit from additional visibility from the County and, in return, educate those seniors as ambassadors for all of the County's senior services. In addition to sharing their information with those they serve in the senior community, senior ambassadors can pass their information back to their larger peer community at home. The synergy is important.

The County also can significantly amplify its impact by developing relationships and cooperative arrangements with private sector service providers. Although these relationships would not be legally defined as "partnerships," they represent a real opportunity for collaboration that would benefit all parties: the corporate entity, the County government, and the County's senior citizens. Where the private sector has expertise, resources, and a complementary mission, it represents an untapped opportunity.

GENERAL FRAMEWORK FOR COLLABORATION

The County needs to follow a **partnership development plan** to leverage resources for seniors. The first step is to **develop a list of potential partners**. Among the list of partners submitted to Reingold for interview purposes, only four contacts represented private companies (officially or unofficially.) Although these companies operate for profit, they provide a valuable service to many County citizens who may *not* qualify for County services. The provision of those services helps keep Montgomery County a desirable place to live. Collaboration with the private sector will enhance the County's senior campaign by bringing broader skills and expertise on senior needs, desires,

functionality, services, options, and marketing, as well as credibility among and access to target markets.

To most effectively leverage these resources, Montgomery County needs to **develop tools for partners to embrace**. For example:

- Banner ads that private sector and nonprofit organizations can rotate on their websites
- Monthly matte-type articles for inclusion in newsletters
- Ads in various sizes and styles
- Speaker's bureau of experts available for presentations to County groups
- Slide show or PowerPoint presentation
- A listserv for members to share ideas
- Networking breakfasts to keep contacts fresh and share best practices
- Posters for dissemination to centralized residential locations
- Postcards for inclusion in mailers/billing
- Fliers
- Brochures
- Blow-in materials for membership mailings
- Pay stub inserts for County employees
- Email template for a "Senior Update" on new developments
- Video/radio background/outreach materials

Finally, Montgomery County needs **a compelling proposal to recruit good partners.** At each stage of involvement, it may be useful to provide a list of possible value-added activities. Executives of busy companies, associations and nonprofit groups appreciate concise, detailed partnership proposals that articulates the "who, what, why, where, and how much" of the collaboration. The proposal should specify the purpose, the approximate time investment, the resources required for implementation, and the outcomes and benefits of each activity and contribution.

Within the parameters of this effort, **Montgomery County is looking for information partners.** Information partners may offer opportunities to publicize the County as the first place to search for senior services. They can include news releases about enhanced travel services, expanded nutrition services, and awards for senior volunteers in their internal communications such as print and electronic newsletters, websites, and signature publications. Some may even agree to display posters and/or fliers about Montgomery County's senior offerings in their offices.

Below we've listed some specific examples of prospects for partnerships available with some of the organizations we interviewed. Obviously, these types of opportunities would extend to organizations with similar missions throughout the County.

Information and Assistance

For example, **the County could also benefit from and information and assistance partnership with the Alzheimer's Association,** which has volunteers with time and expertise to devote to caregivers dealing specifically with issues related to Alzheimer's disease. The County could benefit by referring Alzheimer's-related calls to this partner. In exchange, the Alzheimer's Association could refer seniors and caregivers to other County services that are not specific to Alzheimer's disease.

Marketing and Outreach

Holy Cross Hospital's marketing department produces a tri-annual publication that is mailed directly to thousands of households throughout the County. **Montgomery County could benefit by inserting information into this publication and offering to distribute materials from Holy Cross Hospital in senior centers and other County outlets.** Similar efforts could be launched with other hospitals in the County.

The County also could achieve increased visibility for its senior services through media partners such as *The Beacon* or *The Gazette*. With some negotiation, those newspapers or others might provide space and ink to the County at a discounted rate. *The Beacon* expressed an interest in formalizing an existing partnership in which *The Beacon* provides the County with booth space at its annual Info-Expo in exchange for event marketing opportunities through County channels. Finally, the County might enter into a partnership with *The Beacon, The Gazette, The Sentinel or others* to produce a series of special supplements on topics such as health, nutrition, transit, and housing. These supplements would describe County programs and include a true-life story with a profile of a recipient of care and an interview with the person running the program.

Opportunities to Reach Seniors from Ethnic/Cultural Minority Communities

A few respondents feel that Montgomery County's program development could be more culturally sensitive. **The Spanish Catholic Center of Catholic Community Services would be available to provide a training program for County staff to improve cultural competency with regard to seniors of Mexican, Central American and South American origin.**

Other opportunities to reach out to ethnic/cultural minority seniors include: a partnership with *Washington Hispanic*, an independent weekly Spanish-language newspaper, to produce a series of special supplements for the Spanish-speaking community. Written primarily in Spanish, these supplements could describe the County's senior health, transportation, and housing services. Similar opportunities exist for each language. By teaming with the Chinese American Senior Services Association, a similar effort could be launched in Chinese newspapers like the *Washington Chinese News*. The County could approach the popular Korean translation website www.usabriefing.net to display Web banner ads, stories, or notices

Partnering with the Private Sector

The County could improve its outreach efforts by asking private sector programs, such as assisted-living facilities, meal delivery programs, and adult day centers, to help promote its noncompeting services. The few County partners representing private sector firms were amenable to sharing their resources and dissemination vehicles with the County for noncompeting services. An interview with the principal of Right at Home, a private care provider, immediately resulted in an offer to place stories and other outreach information in company newsletters and monthly communications with his clients.

Examples of Opportunities to Improve or Launch Partnerships
(based on the sample that participated in the outreach process)

Opportunity	Organization	Contact
Information and referral assistance; data sharing	The Jewish Council for the Aging	David Gamse 301.881.8782
Online cross-referencing	The Jewish Council for the Aging	David Gamse 301.881.8782
Client sharing and specialized information and referral assistance	The Alzheimer's Association	Ian Kremer 703.359.4440
Promotion of noncompeting services	The Alzheimer's Association	Ian Kremer 703.359.4440
Promotion of noncompeting services through direct mail	Holy Cross Hospital	Joanne Balkovich 301.754.8510
Discount advertising opportunities	*The Beacon*	Stuart Rosenthal 301.949.9766
County promotion of *The Beacon* information expo, in exchange for booth space at the event	*The Beacon*	Stuart Rosenthal 301.949.9766
Culturally sensitive program implementation to Latino elders	Spanish Catholic Center of Catholic Community Services	Anna Maria Izquierdo-Porrera 202.939.2412
Advertising opportunities through local Chinese newspapers	Chinese American Senior Services Association	Charles Wang 301.838.0888
Korean translation and outreach initiative	www.usabriefing.net	Chulosoo Chin 301.434.1021
Shared information about new strategies and best practices in senior programs	The Jewish Council for the Aging	David Gamse 301.881.8782

Rules of Successful Partnerships

- **Take the burden off your partners.** Clearly define expectations and make sure you use the partner's time efficiently. Equip partners with all the necessary materials, dates, deadlines, etc.

- **Offer incentives and rewards.** Provide positive PR and host an annual event honoring your partners' goodwill.

- **Find internal champions.** Without an internal advocate, the partnership pitch will most likely bounce around without ownership. Buy-in is particularly important from senior officers in both the public relations and the human resources departments.

- **Recognize partnership advocates**. Publicly recognize the key players who made the partnership a reality.

- **Use the thermometer model**. Raise the bar/goals every year, providing incremental opportunities to increase the level of involvement.

COUNTY DIRECTORS SURVEY

Reingold surveyed 15 Montgomery County directors. Of these, nine people were directors of County programs and six work as communications directors for the County.

KEY FINDINGS

- County leaders look for cost effective methods of communicating with seniors in the community but they **may not be using all of their available resources efficiently.**

- Despite a stated preference for "free" materials and formats, **less than half of County directors use e-mail** to share information about programs and services for seniors.

- **Brochures (87%) and flyers (80%) are the most popular** communications mechanisms currently used by County staff.

- Responses indicated that **county administrators feel their staffs do not know the facts about eligibility and access to senior services**, nor do they know how to make referrals or which programs are available through other County departments.

- Directors value collaboration. Twelve out of 15 respondents said that through collaborations with other County departments they are able to **leverage their own resources as well as the resources of their collaborators to increase the spread of information.**

- Respondents expressed **frustration about the slow approval processes** that occur when departments work collaboratively.

- Some County administrators felt that collaborations are difficult because **each department has a different vision of the project** and is trying to attain a slightly different goal.

- Respondents indicated that although departments sometimes collaborate, **there is a need for further collaboration and more focused communication** about County services for seniors.

- A substantial portion of our respondents expressed a **desire for more electronic tools such as a County intra-net, e-mail blasts and listservs to improve internal communication.**

RECOMMENDATIONS

- County staff could benefit from **tools to help them plan effective outreach** and use available resources wisely.

- Montgomery County should implement a **program to introduce its entire staff to the branches of the County that provide services to seniors.** Although a new staff orientation program on senior services exists, the content and importance is lost along the way. That may be due to the timing of the presentation, the structure, the medium or the content. The County needs to develop an effective **ongoing training curriculum for staff** that will work with seniors on a regular basis. The curriculum will include a heavy component of resource identification, as well as cultural sensitivity.

- Communication between County departments could be improved by developing **electronic communication tools such as a senior services listserv, email blasts, a senior services message board, or e-newsletter** on the County intranet.

- Montgomery County could improve internal communication by hosting senior services discussion forums monthly, or at least quarterly. This forum would bring together County staff from different departments. Something similar to this was in place in the past, called the Providers Council, run by Elder Affairs and HHS Aging and Disability Services. Partners and staff both felt that reinstatement of this as a County sponsored event would be very beneficial.

- The County should establish a mechanism for improving coordination of senior services programs to ensure that County departments are aware of each other's operations.

- Communications **strategies and policies should also be implemented to expedite the approval of messages when departments are collaborating.** To ensure swift approval and consistent messaging, a set of approved messages should be developed.

METHODOLOGY

Reingold, in collaboration with Montgomery County, asked nine County program directors and six County communications directors to complete a brief online survey. The responses collected and analyzed are anonymous, however respondents were asked to participate in this exercise by a County representative, so some bias must be assumed.

Reingold, in collaboration with representatives from Montgomery County developed a ten questions survey inquiring about effective ways of communicating with seniors and ways to improve collaboration between County departments. This document analyses the results and makes recommendations based on our findings.

MATERIALS AND FORMATS

Not surprisingly, there is a general preference among Montgomery County directors to use relatively inexpensive methods or reaching out to seniors. Brochures (87%) and flyers (80%) are the most popular communications mechanisms currently used by our respondents. Interestingly, posters are among the least popular formats currently in use

40%). Although brochures and flyers are strong and effective materials, they expire after one use. Strategically placed posters, however, are seen by multiple residents and should not be discounted as an effective format.

County directors reported "free" channels as the most effective ways of distributing information. Many respondents think press releases are highly effective, however when Reingold looked into media coverage of senior services and programs offered by Montgomery County we found significantly fewer story results than expected. This pattern indicates that the press releases being distributed by the County are not being picked up by local newspapers. The county could make better use of this mechanism by structuring press releases to be more appealing to reporters, editors and the general public.

Some respondents said that they ask on-duty staff and volunteers to go door-to-door and share information with County residents because it is "free." While person-to-person outreach is effective, it is time consuming and labor intensive. The use of volunteers and staff to distribute messages might have greater impact if these representatives were asked to put up posters that would be seen by many more people. A good use of staff time would be outreach to develop opportunities for managers to speak about available services in venues, such as residential coffees sponsored by neighborhood citizen associations, or offering an educational session in neighborhoods/buildings with a high percentage of seniors. If management staff are provided with an interesting presentation to share and useful materials to leave behind, these opportunities will help create goodwill ambassadors among your audience members.

Despite the stated preference for "free" materials and formats, less than half of County directors use email to share information about programs and services for seniors. However, more expensive formats such as radio and television ads (33.3%) and print PSAs (53.3%) are popular among County directors.

Recommendation: The response pattern described above indicates that program and communications directors have fallen into the common misconception that social marketing is done through online marketing and PSAs alone. The County's outreach efforts could be greatly improved by leveraging all available resources to distribute information to the broadest possible audience. County directors and staff could benefit from tools to help them plan effective outreach and use available resources wisely.

Montgomery County could improve its media coverage for senior services by offering staff in a variety of departments a guide to writing press releases. This guide would highlight strategies and writing styles to improve the chances of placement.

COMMUNICATING WITH SENIORS

All of the program directors and exactly half of the communications directors surveyed felt that their staffs would benefit from training about senior programs. Of the nine respondents who felt that training would be helpful, five indicated the need for training

on a very basic level. Directors indicated that their staffs do not know the facts about eligibility and access to senior services, nor do they know how to make referrals or which programs are available through other County departments.

Program and communications directors also felt the need for training in specific areas of service delivery, such as identity theft protection, and competency in bridging the generational divide.

Recommendations: Montgomery County should implement a program to introduce its entire staff to the branches of the County that provide services to seniors. The County should also develop tools, such as an intranet or discussion board, to help keep staff up to date on programs and services for seniors.

Montgomery County should develop a training curriculum for new staff that will work with seniors on a regular basis. This curriculum would address a variety of concerns ranging from knowledge of County and private sector programs, to knowledge of trends in the aging population and competence in bridging the generational divide.

COMMUNICATION BETWEEN COUNTY DEPARTMENTS

All respondents have collaborated with other County departments in outreach to senior populations. Some departments were more frequently listed as collaborators. Not surprisingly, The Department of Health and Human Services is the most frequently cited partner in outreach to seniors, followed by Libraries and the Department of Recreation.

Motivation for collaborating with other County departments springs from a desire to reach out to a greater audience. Twelve out of fifteen respondents said that through collaborations with other County departments they are able to leverage their own resources as well as the resources of their collaborators to increase the spread of information. Other benefits include increased financial support and the access to staff with a wider range of skills and specializations.

Despite the strong incentives for County departments to collaborate on program delivery and outreach, there are barriers to overcome. Some respondents expressed frustration about the slow approval processes that occur when departments work collaboratively. Others felt that collaborations are often difficult because each department has a different vision of the project and is trying to attain a slightly different goal.

County directors suggested several ways in which internal communication and collaborative efforts could be improved. Most importantly, they indicated the need for more focused communication about County services for seniors. Popular mechanisms to achieve this include a multi-departmental task force; a regular meeting that would bring together all staff who work on programs for seniors; greater buy-in from the County Executive; and the coordination of services between County departments.

Surprisingly, a substantial portion of our respondents expressed a desire for more electronic communications tools such as a County intranet, e-mail blasts and listservs. This is particularly interesting when considered along with results from the *Partnership Survey*. County partners indicated a need for improved use of electronic tools among County staff. It is encouraging to see that County directors are interested in using this kind of mechanism more frequently.

Recommendations: Montgomery County could improve internal communication by hosting a senior services discussion forum on a monthly, or at least quarterly, basis. This forum would bring together County staff from different departments to discuss programs and partnership opportunities. In the future, partners from the private sector and non-governmental organizations could be invited to join this forum. Furthermore, the coordination of services between County departments would help to streamline delivery of services to seniors, and ensure that County departments are aware of each other's operations.

Communication between County departments could be improved by developing electronic communication tools such as a senior services listserv, email blasts or a senior services message board on the County intranet. Appendix Three details the steps to setting up and managing an internal listserv for County staff who work with the senior population. In addition, once the County has selected a "look and feel," Reingold will be happy to use it in designing a newsletter template for the County or its vendor to simply plug in with appropriate text.

Communications strategies and policies should also be implemented to expedite the approval of messages when departments are collaborating. To ensure swift approval and consistent messaging, a set of approved messages should be developed.

1. In the past, what communications channels has your department used for outreach on services targeted toward the senior population? (Check all that apply)

Press releases	77.8%
Ads on radio and TV	33.3%
Public Service Announcements in newspapers	66.7%
Flyers	88.9%
Brochures	88.9%
Posters	55.6%
Email	33.3%
Promotional items	66.7%
Presentations	77.8%
Direct mail	22.2%
Partners	44.4%
Other *Newsletters* *Assigned and investigator to address senior's concerns/complaints* *Information at Senior frequented venues and events* *Library webpage*	44.4%

2. Effective Communication Methods

Which Communication method has been most effective? Why?

- Radio, press release, posters on buses
- Many regular center users utilize the newsletters as the primary source of info
- Direct Mail
- Brochures, outreaches and television programs
- Our programs and services are open to adults of all ages. We have not been particularly successful in bringing seniors into our Center to use the services provided.
- I believe people have different ways of getting input
- Door to door interaction because we can also understand what else they may need and check for understanding
- Library website provides remote access at home; always available, easy to update

Which methods have been most cost-effective?

- Not sure, haven't evaluated
- Word of mouth is THE most cost effective
- Press releases
- Brochures and outreaches
- Email, press releases (sometimes)

- Printed materials
- Door to door using our on duty firefighter staff
- Same

3. In the past, have you worked or collaborated with any other departments on outreach efforts to senior populations?

Department of Health and Human Services	88.9%
Department of Public Works and Transportation	22.2%
Department of Public Schools	11.1%
Department of Housing and Community Affairs	33.3%
Department of Police	11.1%
Department of Fire and Rescue	11.1%
Libraries	55.6%
Department of Economic Development	33.3%
Commission on Women	11.1%
Department of Recreation	33.3%

4. What benefits did your department realize through the collaborative outreach?

- Increased awareness of programs/services by seniors and caregivers; increased referrals
- Greater spread of information determined through anecdotal evidence only
- Reached a larger number of people
- Increased the audience to receive the message about the various programs available to seniors
- Libraries display our monthly calendars of events, flyers, and special brochures
- Reaching a greater number of seniors with reduced cost to our agency
- Sharing of information and techniques
- Educating the public reduces our caseload
- Networking improved considerably
- Expanded our resources and gave broader range of information to seniors and caregivers
- Able to provide information to much larger group of seniors

5. What challenges or barriers have you faced when working or collaborating on outreach to seniors with other Montgomery County departments?

- Funding—no line item for this
- Uncertainty re: best venue
- Typically none
- No challenges really
- Timeliness in getting approval of the message that will be used in the materials given to seniors
- The greatest obstacle is getting into the school system
- Difficult to move beyond process

- I have not encountered any challenges or barriers. The people that I have worked with have been wonderful!

6. What can be done differently to maximize the impact of outreach collaborations?

- Identify key distribution points/sites (for English-speaking and limited English proficient populations)
- Incorporate professional marketing/information dissemination expertise; use multiple media—print, radio, TV, PSAs
- Survey the customer to determine their most used information source.
- Probably to do collaborative outreach more often—we do not do it often enough
- Template of approved messages so that time will be expedited in getting a final approved product to the senior population
- Create a Senior Ombudsman, possible with the Health Department to coordinate services
- More emphasis from County Executive
- We need to be able to approach them or deliver the most effectively understood information as often as possible in a target period of time
- We need to involve the public sector (JCA, chambers, etc.) as much as possible. I would recommend a multidepartment task force be permanently established, but that group needs to have authority and money. There's nothing worse than sitting around talking about things that we cannot act on. We do need to reach out more effectively to seniors—many of them do not know what the County provides and that they are eligible for County assistance. Often they think they need to be poor in order to qualify for help. Finally, I think that we need to change the way we think about senior services. We may want to have seniors think they are living independently when in reality we are helping them manage their dependency. Even seniors who live in their own homes are not really independent—most of them depend upon family, friends, and the public and private sector for many of their needs.

7. Which communication tools would be most effective in keeping your department up-to-date on county services offered to the aging and disabled population? (Please rank in order of effectiveness where 1 is least effective and 6 is most effective.)

	1 (least effective)	2	3	4	5	6 (most effective)	Rating Average
Listserv	12.5% (1)	25.0% (2)	0.0% (0)	0.0% (0)	12.5% (1)	50.0% (4)	4.25
Brochure	12.5% (1)	25.0% (2)	0.0% (0)	0.0% (0)	37.5% (3)	25.0% (2)	4.00
Training	0.0% (0)	0.0% (0)	0.0% (0)	28.6% (2)	42.9% (3)	28.6% (2)	5.00
Newsletter	0.0% (0)	0.0% (0)	33.3% (2)	0.0% (0)	33.3% (2)	33.3% (2)	4.67
Senior information and referral card (updated semi-annually)	12.5% (1)	12.5% (1)	0.0% (0)	25.0% (2)	12.5% (1)	37.5% (3)	4.25
Other	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	50.0% (1)	50.0% (1)	5.50
						Other (please specify)	view

Other	■ Website/Intra and Internet ■ Intranet listing for quick reference by staff. Internet listing for customers. ■ The Executive or Director saying it. ■ Regular email blast ■ A regular forum, bi-monthly to discuss issues, problems and receive updates. ■ The Web. Email. Electronic information in general

8. Do you feel that training about senior programs and services offered by Montgomery County would be helpful to you and your staff?

Yes	100%
No	0%

What kind of training would you find useful? Who would you send? What information would you want them to gather?

■ The Facts—benefit, how to access, eligibility requirements (if any)
■ Orientation on use of the Internet and intranet. Contact information re: programs & services.
■ Training on how to interact with seniors would be useful to landlord tenant staff and to housing code enforcement staff
■ Training on programs and services for seniors and disabled population
■ Training on resources available and eligibility requirements as well as typical waiting periods to receive service
■ How to persuade seniors that every phone call, letter, or knock at the door is not legitimate. Seniors who are likely to be in debt or sitting home alone during the day.
■ I would send all my staff and as division manager, attend myself
■ How best to communicate and provide information to seniors
■ Understanding the feelings and needs of seniors; how to gain their trust and confidence
■ In 2003, the Library and the Office of Aging and Disability Services combined with the JCA and the AARP to provide four hours of training to all County librarians and library associates. This training provided information about databases and services and provided contacts to over 175 staff. I think this type of training can provide a role model for future inter-departmental trainings. They can be very effective.

9. What other materials, tools and formats could the county provide to make your communication with the senior population easier?

■ Use existing channel switching OPI, County Cable
■ Funding
■ Provide an easy way to communicate with seniors via email
■ Translation services company that can translate all literature, brochures, etc. on the program and services for seniors and people with disability

- I believe seniors are more likely to trust a message if it is from a well recognized figure (like the County Executive) or someone in their age group. Short PSAs targeting them on a verity of scams and problems specific to them.
- We need some type of publication that regularly provides information to seniors, caretakers and providers (public and private)

10. What recommendations would you make to help Montgomery County departments work together to provide better services to the senior population?

- Keep Senior Coordinating Group active (multidepartmental coordinating group)
- Quarterly communication and coordination forum for multiple representatives from each team
- Provide an easy way to communicate with seniors via email
- Provide a point of contact for materials may be developed and all departments submit information for the materials and then have a final product done and material be translated in various languages for the different targeted audiences.
- Understanding each other's programs and services better, sharing information on a regular basis, and working interdepartmentally on programs and services to meet the changing needs of the senior population in the County
- Ombudsman representative as part of the Executive's Office
- Senior targeted workshops on the resources available to them
- A multi-agency consortium that meets on a regular basis
- See question 6 above. Thanks for conducting this survey; good luck to all of us!
- Senior services are needed by seniors, their caregivers, and anyone planning on becoming a senior

COUNTY DIRECTORS APPENDIX VI: COMMUNICATIONS DIRECTORS' RESPONSES

1. In the past, what communications channels has your department used for outreach on services targeted toward the senior population? (Check all that apply)

Press releases	66.7%
Ads on radio and TV	33.3%
Public Service Announcements in newspapers	33.3%
Flyers	66.7%
Brochures	83.3%
Posters	16.7%
Email	50.0%
Promotional items	50.0%
Presentations	50.0%
Direct mail	16.7%
Partners	33.3%
Other *Task Force Membership* *Specific Door-to-Door campaigns* *Newsletters*	50%

2. Effective Communication Methods

Which Communication method has been most effective? Why?

- Brochures, flyers that you can deliver directly
- SFSTF has raised awareness, brochure raises awareness
- Press releases
- Have no real analytical data to answer those questions because we don't ask customers how they hear about us. I believe press releases and speakers bureaus appear to be most effective.
- Monthly newsletters that people can take with them

Which methods have been most cost-effective?

- Email
- Probably press release and events because they are free
- Flyers

3. In the past, have you worked or collaborated with any other departments on outreach efforts to senior populations?

Department of Health and Human Services	88.3%
Department of Public Works and Transportation	33.3%
Department of Public Schools	33.3%
Department of Housing and Community Affairs	50.0%
Department of Police	50.0%
Department of Fire and Rescue	50.0%
Libraries	50.0%
Department of Economic Development	33.3%
Commission on Women	33.3%
Department of Recreation	50.0%

4. What benefits did your department realize through the collaborative outreach?

■ To be honest, I was not directly involved with such efforts, and my recollection is that DED had not specifically targeted the senior population for outreach efforts. However, indirectly and as part of our general outreach to the business community, we have likely touched members of the senior community and would likely do so and have the best results in the future via partnerships with local chambers, community organizations, etc. where we would distribute brochures/flyers.

■ We are very fond of working with other agencies and always get more accomplished this way. It brings together resources, different views and concerns and allows us to outreach to a larger audience.

■ Pooling of resources – funding, distribution

■ It's a win-win situation because both groups are talking to the same residents so the message becomes reinforced.

■ Able to serve more seniors that other wise we never would have reached. Financial savings since costs were shared.

5. What challenges or barriers have you faced when working or collaborating on outreach to seniors with other Montgomery County departments?

■ Again, not DED's primarily target community/area, so I can't really address this question.

■ It takes a lot of time... but it is well worth it.

■ Funding and distribution

■ I know that we cannot always be as cooperative as the other departments would like because we have a plethora of other messages to other target markets riders that need to get out and there is only so much real estate (space) available. Other Departments have the same issues.

■ It's the same population, but different goals for each department. Sometimes having limited personnel available to work with different departments.

6. What can be done differently to maximize the impact of outreach collaborations?

■ In general, I think any outreach effort needs to be clearly researched and defined, and the message being conveyed needs to be easy to understand, relevant to that targeted

group, and delivered in an manner/format best suited to that group.

■ Target specific demographic areas provide additional funding and other support
■ Perhaps we need a senior publication of some type that would have messages appropriate to seniors. It could take the form of a section on the web site or a list serve, although seniors do appreciate hard copies as well.
■ Organize a group similar to the County's Collaboration Council to meet regularly (i.e., quarterly) to discuss, plan, evaluate, etc.

7. Which communication tools would be most effective in keeping your department up-to-date on county services offered to the aging and disabled population? (Please rank in order of effectiveness where 1 is least effective and 6 is most effective.)

	1 (least effective)	2	3	4	5	6 (most effective)	Rating Average
Listserv	16.7% (1)	33.3% (2)	0.0% (0)	16.7% (1)	0.0% (0)	33.3% (2)	3.50
Brochure	0.0% (0)	16.7% (1)	16.7% (1)	33.3% (2)	16.7% (1)	16.7% (1)	4.00
Training	0.0% (0)	0.0% (0)	33.3% (2)	50.0% (3)	16.7% (1)	0.0% (0)	3.83
Newsletter	0.0% (0)	0.0% (0)	33.3% (2)	16.7% (1)	33.3% (2)	16.7% (1)	4.33
Senior information and referral card (updated semi-annually)	16.7% (1)	16.7% (1)	16.7% (1)	16.7% (1)	0.0% (0)	33.3% (2)	3.67
Other	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.00
						Other (please specify)	💬 view

Other	This question is confusing. If you mean how do County employees keep in the know, you should list the Intranet, Employee newsletter like the Overtimes, etc.

8. Do you feel that training about senior programs and services offered by Montgomery County would be helpful to you and your staff?

Yes	50%
No	50%

What kind of training would you find useful? Who would you send? What information would you want them to gather?

■ Trend data. I would probable be involved myself. Population, rates of alcohol use, drunk driving and death and injury from mixing alcohol with prescription and non-prescription medications. To make a topic a priority I need to be able to first show it's a problem.
■ I think it would be helpful but on a limited basis. We just need to know where to obtain info and how to make referrals, not know everything that is available. Program staff would be sent to gather info per response above.

9. What other materials, tools and formats could the county provide to make your communication with the senior population easier?

- I think just keeping us aware (via email/listserv) of existing/new initiatives by the County would help, especially those that may have some direct crossover/relation to what we do here in DED (like those related to workforce issues/training/reentry, etc.)
- E-newsletter, maybe a website on senior health topics
- Any newsletters, etc. need to be electronic
- More senior kiosks made available

10. What recommendations would you make to help Montgomery County departments work together to provide better services to the senior population?

- DED sponsors, participates in and/or is aware of numerous business, community organization, academic, etc. seminars, events, tradeshows, etc. there may exist opportunities to disseminate information on programs, services, resources targeted to the senior population at such events.
- We will continue to be very active on the Senior Fore Safety Task Force and will promote senior safety with alcohol use. We will look to collaborate with anyone who has access to this population.
- Much more could be done with Recreation because many of their activities are geared toward seniors based. I'm not sure if the CVB reaches out to seniors but they are another possibility.

COUNTY DIRECTORS APPENDIX VII: LISTSERV SETUP AND MANAGEMENT

Reingold recommends that Montgomery County establish a Seniors' Communications Task Force, composed of communications directors from each relevant department, with responsibility for addressing the County's daily challenges in communicating with seniors and their caregivers. The task force would meet regularly to identify communications needs, determine priorities, and assign responsibility for new tasks. In addition, the task force would create and oversee a dedicated listserv for all County staff working with seniors.

A listserv is a method of distributing e-mail messages on a given subject to a large number of recipients. Listservs enable free flowing discussion and an ongoing process of sharing information and ideas. They also create a data record of conversations so if there is ever any question about what was discussed, stakeholders can refer back to the e-mail archive. The listserv will enable County staff to exchange information about new and updated senior services—and raise concerns about missing, incomplete or inaccurate information.

Setup

1. Once the County understands the flow of information, it is easy to set up a listserv using an email account. It requires the following steps.

2. Set up a new email account with an appropriate name, e.g., seniorservices@montgomerycountymd.gov.

3. Create a distribution group within the new email account. Name the group appropriately, e.g., "seniorlist," and add the addresses of everyone who should receive emails.

4. Send a welcome email to seniorservices@montgomerycountymd.gov and blind copy the group seniorlist. This will distribute the email to everyone in the group and return a copy of the email to the moderator's inbox.

5. Invite people to subscribe to the listserv by sending an email message to the listserv address. Simply add the new subscriber email addresses to the group seniorlist as they area received. For emails returned with the subject heading "unsubscribe," remove the address from the seniorlist group. Notify these individuals that they have successfully subscribed or unsubscribed form the listserv.

Management

Just as discussions need to be facilitated for maximum effect, listservs need to be monitored and moderated to ensure that the discussion threads remain on topic. Successful listservs have the following characteristics:

- They are accessible and easy to use
- They have a designated moderator who takes an active role in monitoring the list, blocking inappropriate posts and keeping the conversation flowing and on track
- The purpose of the list is clear to the moderator and all the participants
- All participants feel welcome to post on the list

To start a successful listserv, the list moderator must be prepared to spend a significant amount of time inspiring conversation about relevant issues; this is an ongoing task because the moderator will have to launch new discussions if there is ever a lull in the conversation.

When the listserv is first opened, the moderator should send a welcome note and a brief introduction of the listserv and its purpose. If discussion does not take off within a day or so, the moderator should post teasers such as:

- "Do seniors know about Montgomery Rx? Montgomery Rx is a joint effort of Montgomery County and the National Association of Counties, which can save residents money on prescription medications. The card is free and available to Montgomery County residents."

- "I'm interested in spreading information about this program to the senior population. Does anyone have ideas about how to reach out to seniors on this important topic?"

- "Heads up: vandals have been stealing disability parking tags and placards and re-selling them to the general public. Please join us on November 10th to discuss how your department can help us educate seniors about properly securing their parking placards."

When someone posts to the listserv, the message will be delivered to the moderator's inbox for review. If they are appropriate, the moderator may forward them to the list, using the welcome email and substituting its text with the new posts. If the posts are inappropriate, the moderator should write back to the sender and explain why the message was not shared with the list.

Reingold will be happy to establish and moderate the first six weeks of a Montgomery County Senior Services Listserv if you feel this would be burdensome on agency staff.

WEBSITE REPORT

Reingold conducted a usability analysis of the County's current website. We evaluated the overall quality of the site, identified its strengths and weaknesses, and developed preliminary recommendations for website improvements. It is important to note that we focused specifically on pages and content that provide information to seniors and caregivers—not the entire Montgomery County website.

METHODOLOGY

To recreate a typical user experience, we conducted the study using a mid-powered computer system with cable Internet access. We accessed multiple pages of the website to identify areas of the site that are well designed and areas of the site that would benefit from minor redesign, focusing on the following areas:

- **Website accessibility.** How do you find the Montgomery County home page? How do you find information on senior services? What key words do you search for? Is the website validated and compliant?

- **Home page.** How informative is the home page? Does the Montgomery County home page set the proper context for visitors? How fast does the home page load? Does it provide easy-to-understand links to information?

- **Site organization and navigation.** Is the site organization intuitive and easy to understand? Is the global navigation consistent throughout the Montgomery County website? Do major sections have local navigation? Is it consistent? Is there an easy link back to the home page?

- **Readability.** Is the font easy for seniors to read? Are line lengths acceptable? Is the site easy to scan, with "chunks" of information, or is it just solid blocks of text? Do sections have headings and call-outs? Is there ample white space to guide the reader?

- **Content.** Is there sufficient depth and breadth of content offerings? Is there too much information? Does the content match the needs of the audience? Is the content stimulating? Is there a call to action?

- **Attractiveness.** Is the site attractive to an outside viewer? Does the site provide visual stimulation to the user? Would the user want to come back to the site?

- **Performance.** Overall, do the pages load slowly or quickly? Are graphics and other applications optimized for easy viewing and downloading?

KEY FINDINGS

Website Oversight and Management

Montgomery County does not have a central Webmaster for their website. Each department, or each service within each department, is responsible for creating and maintaining its own website and does not collaborate across departments/services. Without a central point of coordination, the County cannot develop standards ensuring consistency for the website.

Website Accessibility

Reingold conducted a test for validation on website accessibility and discovered several warnings and errors that will need to be addressed. For example:

The County website does not appear to be validated as 508 compliant. The County home page has missing roll over descriptions for graphics (alt tags) and descriptive Meta tags for keywords and paragraphs, which are especially important for the many seniors who have visual impairment.

It is difficult to locate the website for the Montgomery County Aging and Disability Services Department. The website domain address is difficult to articulate and remember. County domain name protocols are mandated by the County's Department of Technology Services (DTS). Reingold recognizes that the URL domain name issue is relevant for all of the County departments that provide senior services. This issue is not HHS specific, nor under their control. It is a countywide mandate from DTS. In our experience, other counties who are clients (Fairfax, Prince William, etc.) and the Federal Government are amenable to the use of distinct domain names and easy to remember aliases that point to the appropriate website.

Recognizing this, most schools in Montgomery County have given teachers email aliases that are easier for parents of school-aged children to remember. If the domain "montgomerycountymd" is hard for the Web-savvy 30–40-year-old residents to recall, it is unrealistic to expect seniors and their caregivers to find and use the County website with ease. The website also is difficult to locate through an online search. When we typed the words "Maryland county senior services" (and later "aging services" as well) into the popular Google search engine, the following results appeared in this order:

- www.ElderCareLink.com
- www.montgomerycountymd.gov/content/dpwt/transit/index.asp [MC DEPARTMENT OF PUBLIC WORKS AND TRANSPORTATION]
- http://www.montgomerycountymd.gov/tsvtmpl.asp?url=/content/dpwt/transit/seniors.asp. [MC DEPARTMENT OF PUBLIC WORKS AND TRANSPORTATION for Seniors]

The Montgomery County website for the Montgomery County Aging and Disability Services Department does not appear among the top 10 results. In a similar Google search with keywords "senior services for Montgomery County," the MC HHS website was the first result on the screen, but referenced information for only the Behavioral Health Services department:
http://www.montgomerycountymd.gov/hhstmpl.asp?url=/content/hhs/bhcs/sss.asp
Again, the Senior Information Page, with links to County-offered senior services, does not appear among the results.

Alternatively, using a Yahoo search engine, we entered the words "senior Montgomery County" with the following results in this order:

- http://www.montgomerycountymd.gov/
- http://www.montgomerycountymd.gov/cittmpl.asp?url=/content/citizen/seniors.asp[This result is encouraging, however, this link provided a list of senior services (mostly not on the Montgomery County website), but the link to the Aging and Disability Services was inactive and linked to a blank page.]
- http://www.mcssl.org/ [Montgomery County Senior softball league]
- http://mcaas.montcopa.org/mcaas/site/default.asp [(MCAAS) in Pennsylvania -- Montgomery County Office of Aging and Adult Services]

Although direction to the Montgomery County home page is good for the first result in an organic search, it takes more than three clicks for seniors to get from that home page to any specific information they might be seeking. Consumers want to be sent directly to the information they are seeking, rather than be forced through a labyrinth laid out by the County. **In fact, our focus group research indicates that this strategy may backfire in terms of garnering the County goodwill.**

Home Page

Technically, the home page performs well. Our team was able to load the Montgomery County home page very easily and quickly using Mozilla Firefox and cable Internet. In addition, the scroll bar at the top of the screen moved at an appropriate pace and the center graphic loaded without any problems.

In general, the Montgomery County website is full of vital information about all the services and programs offered; however, **the home page fails to successfully showcase all the information that is available to the user**. Instead, the main focus of the home page is a center graphic that links to a key news story; most of the content is either below the fold or hidden behind one of the links.

The primary navigation labels can be broken down more. Currently, the primary navigation labels on the top of the screen are "Residents," "Government," "Businesses," and "Cultural & Leisure." The primary navigation labels on the left of the screen are "News," "County Executive," "County Council," "Departments," Services," "Online

Services," "County Cable 6," "Transportation," "Education," "Careers," "Volunteers," and "Contact Us."

As you can see, some of the navigation labels are somewhat random and the end-users must click on various labels to get a better idea of what each one means. For example, on first glance a user cannot tell the difference between "services" and "online services"; therefore, users must click on one of those primary labels to determine if it will lead to the information they are seeking. We recommend using drop-down menus to further define what each label offers to the end-user so the visitor does not need to click on several tabs before finding the information they want.

Site Organization and Navigation

The Montgomery County website provides valuable information to many audiences; however, the site could be more organized so users could easily find information. We understand the County has a lot of information to communicate to multiple audiences, but it is somewhat difficult to navigate within the pages to find specific information.

For example, during our team's first visit to the Montgomery County website for this audit, to locate and retrieve basic information on "senior services" we had to navigate through multiple pages. We took the following specific path:

1. Clicked on "Residents" on the home page
2. Scrolled down the page and clicked "Senior Information and Services"
3. Again, clicked on "Senior Information and Services"

Ideally, the user would have been linked to the information after the first click on "Senior Information and Services," but instead the user has to navigate through an additional page. Most seniors will not have the inclination or patience to search through the website's cluttered pages to find the information relevant to their visit.

The website does have a home link button that is easy to find. Research studies indicate that most users anticipate a link back to the home page will be located in the upper left corner of each page—which is exactly where Montgomery County has its home link.

Although we congratulate the County for using a consistent global navigation structure throughout the entire website, we believe the County can take the navigation structure a few steps further. By using descriptive drop-down menus under the primary labels and reducing the amount of text on each page, users will be better able to find the information they seek.

Major sections of the website have consistent local navigation, but it is easily lost beneath a landslide of text. For example, on the Health and Human Services main page (http://www.montgomerycountymd.gov/hhstmpl.asp?url=/content/hhs/index.asp) the local navigation links ("Home," "About HHS," "Directory of Services," "Locations,"

"Helpful Links," "Contact Us," and "Sitemap") are easily overlooked because of the Web button in the middle of the page and the call out box right beneath the button on the fold. To find the local navigation, the user must actively search for it—instead of being able to quickly scan the top of the page.

The Health and Human Services main page has a drop-down menu listing all the programs available through the department, but even after several visits to the page, our team missed the drop down menu because it is hidden between two navigation systems—the global navigation and the local navigation. Also, the text for the drop-down menu is too small for seniors to comfortably read.

Finally, the site lacks a separate site map for Senior Services.

Readability

Overall, the font throughout the website, and specifically on the Health and Human Services pages, is too small for seniors to read easily. The County should provide a tool on each page to increase the font size, if desired. By adding this simple tool, the County will increase the readability of each page and ultimately create a better user experience for seniors.

In general, the Health and Human Services pages could benefit from a reorganization of content. A majority of information on the main page is below the fold, meaning a reader has to scroll down to view the content. Ideally, the important and most requested information appears above the fold—limiting the need to scroll through the page. The most typical computer screen resolutions are 800 x 600 or 1024 x 768 and in each case the information below the fold is unseen at initial glance.

For example, on the Senior Information and Services main page (http://www.montgomerycountymd.gov/hhstmpl.asp?url=/content/hhs/ads/seniorsite.asp), the information is clearly grouped together in an outline format, so the user can scan the page to find the topic of interest. However, tweaking the content layout would make the presentation of information more attractive and useful. The page also has excessive bold text, colored font, underlined text, and call-out boxes.

Content

The Montgomery County website, and specifically the Health and Human Services website, provides a wide breadth and depth of information for seniors and caregivers. However, in the world of Web writing and design, quick, clear text is essential. Visitors spend an average of 22 to 25 seconds scanning a page for content, then 10 seconds deciding whether to stay on the page or move elsewhere. The website's pages regarding senior services do not captivate the reader. The layout is confusing, with a number of distracting links and competing bold text. The goal is to get users to the "second click." Users should be engaged from the moment they find the site, interested enough to want to click deeper into the site.

As mentioned earlier, the site organization, text layout, and design are cluttered and confused. There is a feeling of information overload most of the time surfing the site. If our tester and tech team felt overwhelmed, we know that seniors will likely abandon the site.

On some specific pages, the website does a good job communicating a call to action, when appropriate. Where applicable, the content clearly tells seniors how they can get involved, how they can use the services, and/or how they can make a difference. For example, the "Call N' Ride" page (http://www.montgomerycountymd.gov/apps/dpwt/callnridenew/default.asp) has the following calls to action: "login to order," "click here to register," and "submit change of address."

Attractiveness

Overall, the Montgomery County website offers little memorable visual stimulation—pages are cluttered, and there is no apparent design strategy. Compelling and relevant information is either too long or buried beneath distracting graphic elements or call out boxes.

Performance

The County website, and specifically pages geared toward seniors, contains information that loads quickly using cable Internet. Of course, the load time will increase if the user is using a dial-up connection. In addition, the County's information, documents, and graphics are easily viewable and downloadable using programs such as Adobe Acrobat, and the County also included links for downloading the most recent version of Acrobat and other programs the user might need.

RECOMMENDATIONS

The Montgomery County website is one of the County's most valuable resources; it is the first place many people will look for information about senior services and programs. Our mall intercept survey found that an impressive 47% of Montgomery County seniors would use the Internet to find services they need. While caregivers were not separately sampled in the mall intercept survey, feedback from the caregiver focus group informs us that adult children caregivers are highly predisposed to utilize the Internet as a source of information. In addition, potential partners will use the website to gather information about programs and services. The media also will check out the site as a source for relevant articles. The importance of the website as an information channel will only grow as the boomers move into the senior cohort. At the moment, the website is not as effective as it could be as a marketing and education tool.

Website Oversight and Management

Assign a central Webmaster for the Montgomery County website. To enhance website organization and upkeep, Reingold recommends the appointment of an overall website manager for oversight of content and maintenance.

Website Accessibility

Address website validation and compliance issues. Reingold suggests the following processes to validate the County website: achieve 508 compliance and create descriptions for graphics (alt tags) and accurate Meta tags for keywords and paragraphs. Addressing these problems is key for the disabled and visually impaired.

Increase the online visibility of the Montgomery County website and the Aging and Disabilities website.

■ **Develop a website alias or landing page with a recognizable and memorable website address.** We strongly recommend creating an easily recognizable website address for the County website and all County departments that County residents of all ages can remember and access.

■ **Optimize website exposure for online searches. Reingold suggests performing keyword research to optimize the existing web site** and enhance the landing pages so that visitors are directed to the appropriate pages when searching by keywords. In addition, a **paid search campaign could be a very effective, yet *inexpensive* way to drive traffic to the website.** Montgomery County would be able to obtain keywords to guide residents to the appropriate landing pages and information. It would be a service to help visitors find the pages they are looking for rather than being diverted to other less relevant web sites.

■ **Participate in paid sponsorship of website search engines**. Montgomery County can sponsor links on website search engines. Current sponsors on Google for key words "Maryland senior services" include: Elder Care centers, nonmedical living assistance, search engines for local caregivers, CARIE.org (an organization dedicated to finding programs and services for seniors), AARP, Maryland.local.com, and Maryland Elderly services.

Home Page

Include drop-down menus to further define primary labels. The introduction of drop-down menus will help users find the information they are seeking faster, provide a central location for information, and improve the overall user experience.

Site Organization and Navigation

Improve the navigation of the site to limit the number of clicks it takes a user to find information. Because it took our team an unnecessary extra click to reach information on "senior services," we recommend streamlining the site as much as possible so users can reach the information they desire in the least amount of clicks. Reingold recommends creating a website map to simplify navigation and guide the reader to the most relevant information.

Reorganize the content so users can easily find relevant information. Content can be reorganized to clearly and simply speak to each target audience—not just seniors and their caregivers—and answer important questions for seniors such as "What benefits does the County offer me?"; "What programs and services would benefit me most?"; "Do I qualify?"; and "How do I access and use the services?"

Readability

Increase the font size on drop-down menus and throughout the site. To increase the readability of the site for seniors, we recommend increasing the font size of the "services" drop-down menu on the Health and Human Services main page. We also recommend incorporating a tool on every page for users to increase or decrease the font size as needed.

Limit the amount of distracting text elements. We also recommend limiting the amount of bold text, colored font, underlined text, and call out boxes.

Content Recommendations

Tweak the content to make it more appealing to the reader. In addition to improving the visual appearance of the site, we recommend revising the copy to make the site more engaging for the reader. We also recommend moving the important content and frequently requested content above the fold, so users do not need to scroll down the page to find the information they want.

Attractiveness Recommendations

Improve the visual stimulation of the site. We recommend adding images and interactive elements that stimulate the user and encourage further site exploration. However, care needs to be taken to ensure the pages are not too busy and still load quickly and efficiently for users.

Performance Recommendations

Ensure the pages continue to load quickly and efficiently. Although the current website performs well technically, it is important to see that any changes the County makes maintain a focus on performance. If the County decides to add interactive

elements to enhance the users' experience, it will also need to ensure the site loads effortlessly and without long loading times.