



National Assistive Technology Technical Assistance Partnership

**Improving State Assistive Technology Programs
Considerations for Effective Implementation**

**Setting Up Device Loan
and Demonstration Programs**

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Considerations for Effective Implementation Setting Up Device Loan and Demonstration Programs

In accordance with the Assistive Technology Act, the statewide Assistive Technology Programs (AT Programs) directly or in collaboration with public and private entities demonstrate a variety of assistive technology (AT) devices as well as loan devices for trial use. These services assist individuals to make informed choices about which are the most appropriate devices for them by providing opportunities to try out devices in their natural environment and to work with program personnel familiar with the devices and their applications.

Establishing an effective device loan program and device demonstration program requires careful consideration of many variables.

Advice on effective practices for setting up device loan programs and device demonstration programs was collected from a conference call on May 25, 2006, hosted by the National Assistive Technology Technical Assistance Partnership (NATTAP). There were four featured speakers: two on device demonstration programs and two on device loan programs. The information gleaned from the presentations and discussion that followed was used to develop a framework for considerations for effective im-

plementation of device loan and demonstration programs. The four featured speakers were as follows: David Baker, Missouri Assistive Technology Council; Milissa Gofourth, Oklahoma ABLE Tech; Kathy Griffin, United Cerebral Palsy of Idaho, Regional Center; and Willie Gunther, Illinois Assistive Technology Center.

Setting Up an Device Demonstration Program

When developing a device demonstration program, states should answer a number of questions. The following considerations will help states decide how a center should operate and what devices will best suit its customers' needs:

1. What are the goals and who will be the audience for the device demonstration program? The purpose of a device demonstration program is to assist people make informed decisions about their assistive technology needs. As a state looks at its unique needs, it is crucial to determine what the state wants to achieve and whom the device demonstration program will serve. Identifying and setting priorities for a program's target audiences, such as rural populations, school-age children,

the elderly, or service providers will strongly influence the design of that program.

2. How will the program be designed and operated? No single configuration of a device demonstration program is right for every state. Depending on the size of a state, the size of the program, and the needs of the customers to be served, the state may need to implement multiple methods of providing device demonstrations to reach individuals statewide.

A state should start by considering whether one centralized location, a mobile device demonstration unit, regional centers, or a combination of those will suit the needs of customers in the state. Regional centers may save on shipping and travel, but may create other challenges such as all staff members not knowing what devices are available statewide. In addition, there may be different equipment housed at different centers, which could pose a problem with tracking and management. However, a centralized tracking and management system would resolve this issue.

A mobile device demonstration program is another alternative when considering the distance an individual has to travel to receive AT services. For some areas, it would be preferable to provide services with a mobile device demonstration program, rather than to subsidize the transportation of some individuals to a center.

Location of Programs. Whether centralized or regional, the building in which a device demonstration program is housed affects public awareness. A large storefront on a busy downtown street may invite greater walk-in traffic, while space shared with or near to other like resources for individuals with disabilities may invite more referrals.

Space Requirements. Because space can be expensive, it is critical to maximize space to

best serve a program's customers. Space availability determines the type and quantity of devices that can be displayed, the number of customers that can be served on an average day, and the manner in which device demonstrations can be conducted.

Hours of Operation. Device demonstrations need to be available on a schedule that meets the needs of a program's customers, both consumers and professionals. Whether a device demonstration program will take only scheduled appointments or will accept walk-ins will have ramifications for both staff members and customers. Will device demonstrations be provided during evenings and weekends? Many have found that operating a set 6–8 hours per weekday but scheduling evening and weekend hours as needed is more effective than having set hours at those times.

3. Are there other device demonstration programs in the state? There may be other device demonstration programs that cover a particular region of the state or that specialize in a particular kind of AT, such as agencies for the blind. If that is the case, the statewide device demonstration program may want to focus on an un-served region in the state or a specialty area. A state should identify the other device demonstration programs and develop collaborations with them so that not only can they refer customers to one another, but also they can share knowledge and even devices. This is a win–win situation, both for AT programs and for their customers.

4. What devices will be used? For the most part, the devices used in a demonstration program should be dictated by the needs of the customers and the goals of the program. Space and budget also will play a role, but states will not know how best to target the funds and to use the space unless they know what consumers and others need. A device that no one uses takes up space and obligates funds that could have been used toward the purchase of devices

that are in higher demand. States should survey their customers and providers to find out what devices they would like to see included in a device demonstration program. States may also want to track devices based on use and nonuse to see what is popular and what is not.

5. What devices will be added later? Device demonstration programs should stock devices based on consumer need and interest. They should keep an ongoing list of equipment that people request but that the device demonstration program does not have. This list will allow the device demonstration program to plan ahead for when it is time to update equipment or to add to the inventory.

6. How will the program be funded? Funding will always be an issue, not just for purchasing devices, but for paying staff members and for leasing space. While an upfront infusion of dollars may be helpful in initially stocking a device demonstration program, it is important to consider the funding needed to support the program on an ongoing basis. It is also important to consider potential sources of funding that a program may be able to tap into, and whether some device demonstrations may be provided on a fee-for-service basis or through contracts with state agencies and community organizations serving individuals with disabilities.

7. How will devices be maintained and replaced? Technology changes rapidly, and devices that are used frequently will wear out. Programs need to prepare for equipment maintenance and replacement of inventory. Some effective strategies include the following:

- a. Set aside funds for repair, maintenance, and replacement. A program needs to maintain a reserve fund to keep up to date with devices and warranties. States have found that they spend about \$50,000 per year to keep their equipment current and about \$5,000 for warranties. Of course, those

amounts will vary depending on the size of the demonstration program.

- b. Consider purchasing maintenance service agreements. Such agreements might be especially appropriate for augmentative and alternative communication (AAC) devices, which tend to be fairly expensive to repair and replace.
- c. Frequently check the program's inventory of devices to see if they are functioning and if they are still available through the manufacturer. Devices that are no longer available can be pulled off the demonstration floor and recycled or used in a loan program. If used in a loan program, use the device to fill a need while another device is being repaired or replaced. Do not use a device that is no longer available for purposes of decision-making because the device is now out of date.
- d. To save funds, develop a pool of volunteers to fix equipment that breaks. Consider building relationships with local technical and trade schools and with volunteer engineers.

8. How will the program be staffed? The AT Act requires that device demonstrations be conducted by individuals who are familiar with the devices and their applications. That requirement means that recruiting, retaining, and training staff members are all essential.

- a. Device demonstration programs need to consider the devices they have and the staff expertise they need to demonstrate the devices appropriately. Some programs may have qualified AT in-house staff members to provide general device demonstrations, while others may contract with occupational therapists, physical therapists, and speech language pathologists on an as-needed basis to provide more specialized device demonstrations.

- b. Initial and ongoing training of staff members is essential in meeting consumer needs. Consider how staff members will acquire necessary skills and stay current on new technology and how that training will be funded. Vendor in-service training, training from in-house staff, visits to manufacturer's web sites, and hands-on training of equipment can be used to contain costs, but sometimes staff members will need professional development that can be provided only through conferences or by paid speakers or specialists.
- c. On a day-to-day basis, device demonstration programs need to keep a sufficient number of in-house staff members to conduct device demonstrations during operating hours or as scheduled. This number becomes more critical when staffing mobile device demonstration units or sharing the staff across regional centers.

9. How will relationships be built with local vendors? A positive relationship with vendors benefits not just a program's device demonstration activities, but also its customers. Vendors may be able to assist by providing devices for demonstration. They may also make themselves available for in-service training for the center's staff, keep a center current on technology, and to allow trial of new products before purchasing them for demonstration. In turn, the vendors benefit from referrals and potentially added sales of devices within their community.

10. How will used devices be recycled? AT Programs may decide to recycle devices that they no longer plan to use for demonstrations. If devices were purchased with state funds, AT Programs must be careful not to breach state procurement rules. They may also consider loaning devices to an individual whose device needs repair or consider providing

them to schools for use in assessments. For guidance on disposal of outdated devices, check the Education Department General Administration Regulations (EDGAR). Under Sec. 80.32–Equipment, it states:

“(a) Title. Subject to the obligations and conditions set forth in this section, title to equipment acquired under a grant or subgrant will vest upon acquisition in the grantee or subgrantee respectively.

(b) States. **A State will use, manage, and dispose of equipment acquired under a grant by the State in accordance with State laws and procedures....”**

Under the AT Act, states were required to provide an assurance that "a public agency or an individual with a disability holds title to any property purchased with funds received under the grant and administers that property." Therefore, an implementing entity must defer to the lead agency when it comes to disposing of property.

Setting Up an AT Device Loan Program

As with a device demonstration program, it is critical for a device loan program to build the right inventory, maintain the devices, and update the inventory on a regular basis to best meet the needs of its customers. However, inventory needs will be different when loaning devices versus when using them for demonstrations. A one-time demonstration is sufficient for certain devices, while other devices require extended trial, training, or customization to determine if they are the right choice for the consumer. Choosing the right AT devices and spending wisely are paramount to the success of a device loan program.

As with a device demonstration program, there are several factors to be considered when building a device loan program.

1. Which devices will be purchased? When building an inventory for a device loan program, a center should consider devices that are harder to acquire, devices that often need a long trial, or devices that are too expensive to rent. Those devices may require more set-up time, training, and customization, and using these devices may require the assistance of family members, professionals, or both.

- a. Focus on AAC devices, computer adaptations, and higher end visual aids rather than on ADL (aids to daily living) devices. Higher end visual aids, AAC devices, and some computer adaptations are generally more costly and require extended use to determine their effectiveness. They can also often be difficult or expensive to rent or purchase.
- b. Avoid items that pose hygiene issues that are difficult or time consuming to deal with, such as stuffed toys with adaptive switches.
- c. Build an inventory of durable medical equipment (DME) that people do not have access to through local providers, such as stair climbers or lifts. Wheelchairs would not be one of those DME items because they are often easier to procure for demonstration purposes. Wheelchairs are too diverse to stock in inventory and are most often funded through traditional sources.
- d. Develop a network of people within the state to help update a device loan inventory. These people can be specialists within a particular field, technology specialists within the schools, informed consumers, and vendors. Their advice can help a program keep current about new technologies in the different specialty areas within AT. Consider performing a formal needs assessment with disability-related organizations and agencies to see what would meet their constituent needs as well.

- e. Assume that about \$50,000–70,000 will be needed annually to update inventory. This amount is what several programs spend a year. Of course, the cost will vary depending on the size of the device loan program.

2. Who will be borrowing the devices?

The goal of a device loan program is to give consumers experience with AT devices and to help them make informed choices by trying out various devices. A program may choose to lend devices directly to consumers or their family representatives, or only to those who have signed up for the device loan program. Some statewide AT programs do not lend devices directly to the individual but to agencies, school systems, healthcare professionals, or a combination of these. Considerations for device lending include the following:

- a. Charge a fee for borrowing devices. Some programs feel that charging a small annual fee to individuals or agencies that sign up for the device loan program is necessary and appropriate. Many device loan programs do not charge any fee at all so that cost is not a barrier for trial of equipment. While some device loan programs do not charge directly, they may send out an evaluation form with an envelope for voluntary contributions. However, it is made clear that by not contributing does not in any way affect a user's future access to the program. The money collected can then be kept in a separate account to be used to purchase new devices or to repair and maintain existing inventory.
- b. Consider the quantity of devices loaned to individual borrowers. The number of devices an individual can borrow at one time and the number of people who have signed up to borrow from the program will definitely affect

inventory and the program's ability to meet the demand.

3. How will outdated devices be used? Outdated devices can be added to the AT Program's loan inventory. Old devices can be loaned to people whose own devices need repair or replacement. They should not be used for new assessments if the devices are no longer available for purchase. Device loan programs need to be constantly aware of any product recall notices and remove any devices from its inventory that have been recalled.

4. How will decisions on new device purchases be made? Because technology can change frequently and money may be spent throughout a fiscal year, it is good to maintain an ongoing wish list of devices to purchase. Keeping a list of devices allows a device loan program to methodically research devices and add products over time. Some manufacturers update their devices frequently, so it is necessary to keep track of current technology and upgrades. Local vendors, manufacturers' representatives, manufacturers' and vendors' web sites, and AT specialists in a program's network are good sources of information about products. Spread purchasing of new devices throughout the fiscal year so that when a new product is introduced, it can be added to the inventory.

5. How will repairs and maintenance be handled? Device loan programs should keep a repair history on each device. Some devices are used frequently and will wear out faster than others. Some devices purchased may have chronic problems either with the individual device or with the particular type of technology; it may be wise to consider waiting until the problem is resolved before purchasing more of those types of devices. Service contracts should be considered on some of the most frequently used or expensive devices, such as AAC devices, so that maintenance costs are predictable and planned for in advance.

6. Will devices used for demonstration be available for loan? If a device demonstration program and a device loan program are to be run from the same location, it is important to plan to have multiples of devices that will be used frequently. Though it is important to be able to loan devices for trial or for those in dire need, the needs of consumers wanting a demonstration should also be considered.

7. Who will pay for shipping of items? Consider who will pay to ship devices out and to pay for their return. A program may choose to charge for shipping both ways, for the return only, or for neither. Shipping charges need to be considered carefully, depending on how many devices are loaned out annually, on whether it is a hardship for consumers to pay for the return, and on how charges could affect the use of the device loan program. It is important to consider whether to carry insurance on the device when shipping it; insurance is expensive and many centers feel that it is not worth the extra cost. Many programs opt not to pay the extra cost on the basis of the low level of risk associated with not getting a device returned. However, there is always a risk of loss, so a program needs to carefully consider whether the extra expenditure is cost-effective.

8. Will computer software be loaned out? When loaning out computer software, a program must be aware of issues with copyright and licensure infringement. To protect the state from illegal usage, the program has several options:

- a. Send the software with warnings regarding illegal use of the software.
- b. Send out demonstration versions of software whenever possible because they do not have the same usage restrictions.
- c. Use software that is available from the manufacturer at no cost for a timed trial period.

- d. Pre-install the software on a laptop and loan both out.

9. How will the program reach out to seniors in the community? Senior citizens are a large and growing segment of the general population and potential AT users. There are several ideas for increasing public awareness of AT resources for this population:

- a. As part of statewide AT programs' outreach strategies, presentations are made at senior group meetings and conferences, and the gadgets are presented as tools, not as assistive technology devices for addressing a disability.
- b. When elders visit the device loan program looking for devices to address their functional limitations, staff members may wish to increase awareness by keeping other gadgets nearby that could also be useful for that functional limitation.
- c. It is important to be active and to collaborate with state agencies on aging.
- d. Staff should provide articles with pictures of different devices in "Senior News" or other publications targeted specifically to seniors.
- e. State fairs bring thousands of people to fairgrounds, so having a booth and showing different devices increases public awareness.
- f. Another approach is developing targeted fact sheets on issues, such as "Aging with Technology: A Way to Stay Independent," that get circulated to different organizations and agencies that serve elders in the state.

10. How will training be provided for a loaned device? Some devices will require training to set up and evaluate the effectiveness of the device for a particular user. The different approaches that can be taken to provide this training depend on what the device is, how far the consumer is from the pro-

gram's location, and what other support people are available to conduct the training.

- a. If available, a mobile device demonstration program may be used to transport knowledgeable staff members to the client and provide training.
- b. School systems or agencies often have permanent staff members to assist with training.
- c. A service provider who recommended a device or another AT professional could be used to provide support to assist an individual borrower.
- d. A number of companies provide online tutorials that can help train the borrower.
- e. A staff member can schedule a specific time to talk on the telephone with the user and to describe how to operate a device step by step, especially when there is another device that can be used in parallel at the center.

11. Will the program contract with other agencies to provide its loans? States will want to consider whether to provide all loans directly through their program or to contract with other agencies or service providers throughout the state for any or all of those services. Contracting with a regional provider, through memoranda of agreement (MOA), to supply both an experienced staff and devices to loan can potentially lower total costs. The state can choose contractors that serve specific geographic areas or serve persons with specific disabilities. Examples of MOA partners that serve specific populations and areas are schools for the blind or deaf, visual service divisions of departments of rehabilitation, or university schools for communicative disorders, and so forth.

Resources

A text and audio transcript of the "Selecting Devices for Loan and Demonstration Pro-

grams” conference call can be found on the NATTAP website at <http://www.resna.org/taproject/activities/deviceloans.html>.

A sample copy of a memorandum of agreement can be found at <http://www.resna.org/taproject/activities/demo.html>.

A summary of considerations for use of mobile units for demonstrations can be found at <http://www.resna.org/taproject/activities/demo.html>.

An example of an AT Device Inventory List (from the Illinois Assistive Technology Program) can be found at <http://www.iltech.org>.

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