



Device Demonstration and Device Loan Programs: Considerations for Implementation

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I. Defining Device Demonstrations and Device Loans

Under the AT Act, the state-level activities to which a state must dedicate most of its funds include device demonstrations and short-term loans of assistive technology.

Device Demonstrations

“The AT Act states: State shall directly, or in collaboration with public and private entities, such as one-stop partners, as defined in section 101 of the Workforce Investment Act of 1998 (29 U.S.C. 2801), demonstrate a variety of assistive technology devices and assistive technology services (including assisting individuals in making informed choices regarding, and providing experiences with, the devices and services), using personnel who are familiar with such devices and services and their applications.”

A device demonstration enables an individual to make an informed choice, even if that choice is to not purchase any device. To create this outcome, a viable device demonstration meets a number of criteria. A demonstration provides individual, guided experience with the device(s), is interactive, and is conducted in real-time. It allows comparison of the features and benefits of a particular device or category of devices and is led by an individual with technical expertise related to the device(s).

Though preferably conducted hands-on, there are ways that demonstrations can be done through distance learning or video conferencing if they meet the above criteria. A demonstration is NOT a training that includes showing a variety of devices, a public training activity, or an archived presentation of devices. For example, a pre-programmed tutorial would not constitute a demonstration.

Demonstrations are conducted in a variety of settings, depending on a program’s structure. Some states have regional demonstration centers, some have a central demonstration location, others have mobile demonstrations, and still more have combinations of these options.

Device Loans

A second state-level activity is device loan. “The AT Act states: the State shall directly, or in collaboration with public or private entities, carry out device loan programs that provide short-term loans of assistive technology devices to individuals, employers, public agencies, or others seeking to meet the needs of targeted individuals and entities, including others seeking to comply with the Individuals with Disabilities Education Act (20 U.S.C. 1400 et seq.), the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.), and section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794).”

Like device demonstrations, loans are primarily intended to assist individuals make informed choices about devices, though loans may serve other purposes as well, such as fill in the gap for a consumer waiting for repair or funding for their own device or to provide a short-term accommodation. Devices can be borrowed for self-education for a consumer or professional, and for training. Depending on a state’s policies, only one device may be loaned at a time or several devices may be borrowed at once.

By definition, device loans are short-term, though each program may determine the length of the loan. An open-ended loan in which the consumer can keep the device as long as he or she needs it is considered a form of device reutilization, not device loan.

Loans are made in a number of ways: sometimes the devices are shipped from either a central location or regional location to a consumer; sometimes a consumer is responsible for picking up and dropping off a device from a central or regional location. Programs have established their own methods and their own policies regarding device loans based on their structure.

II. Considerations for Program Implementation

When determining the design of your program, there are three primary considerations that will determine your operations:

- Program scope
- Administrative structure
- Cost

A. Considerations for Program Scope

Program scope takes into account the depth, complexity, and diversity of your equipment inventory, expertise of staff, and the overall reach of your program.

A basic inventory of low tech equipment requires less staff expertise to demonstrate, presents fewer complications with maintenance and repair, and is generally of lower cost. Providing higher-end AT is generally more complicated, requires greater staff expertise and often takes more time to work with the consumers.

If you have the appropriate level of staff expertise to match the complexity of your inventory, you can properly represent the equipment, its potential application(s), and optimize the setup for the best client demonstration or trial. This requires on-going training opportunities as well as initial qualifications, and these are addressed in greater detail in the staff development section of this document.

Your overall reach is defined not only by the quantity of items in your inventory but also the type of equipment you demonstrate or loan and the consumers you serve. Inventory to meet the needs of children for early intervention will differ greatly from tools used by seniors for assistance with daily living activities. People with neuromuscular disease have progressive conditions that may require low tech devices to complex powered mobility, computer access, and augmentative and alternative communication devices. Consumers with visual impairments require a highly specialized inventory. Though you want to be comprehensive and statewide, you have to determine what populations you can reach initially and in what parts of the state. Once that is achieved, you need a strategy for building capacity by leveraging resources and establishing partnerships to reach additional locations and populations.

B. Considerations for Administrative Structure: Centralized vs. Regional Model

The first decision concerning administrative structure is to determine whether to use a centralized or decentralized model for your device demonstration or loan program, meaning that you either cover your state from one central location, or you have centers regionally (either run by you or operated through sub-contracts or with partners and collaborators).

There are advantages and disadvantages to each model, whether for device demonstration or device loan programs. Table 1 summarizes the advantages of the two models. Table 2 delineates the disadvantages of the models.

Table 1. Advantages of Program Models

| Model | Advantages |
|----------------------|---|
| Centralized Model | <ol style="list-style-type: none"> 1. All information, data, and staff are in one place, so there is direct oversight of these areas. This makes data collection, program evaluation, training, and other activities easier to coordinate. It is easier to leverage state dollars when it is easier to define the scope of your program. 2. You can set up greater volume purchasing discounts because all inventory is purchased and maintained at the same center rather than divided among regional centers. 3. You can develop very good communication with vendors because of the single point of entry with the program. Vendors are able to build stronger relationships with a core group of staff members for referrals and sharing of data. 4. It may be easier to get more high level expertise housed in a central location because the centralized location will often be chosen by population density, urban vs. rural location, better access to professionals from higher education. 5. It is easier to manage inventory from a central location. 6. There is better consistency of data because you don't have to mix and match data from several sources. |
| De-centralized Model | <ol style="list-style-type: none"> 1. It is easier to leverage money for support from the community, as many philanthropic organizations are regionally based. 2. It is easier to use existing equipment pools at a local level, whether it is focused on some specific type of technology or disability. 3. You can realize some operational savings because of less travel required from staff or by the consumers you want to reach. 4. Shipping costs may be lower or non-existent. 5. The consumer connection when people come in is greater and more personal, whereas centralized centers rely more on telephone and e-mail correspondence. |

Table 2. Disadvantages of Program Models

| Model | Disadvantages |
|----------------------|---|
| Centralized Model | <ol style="list-style-type: none"> 1. Operational costs may be higher if you are not partnering with other existing agencies that will offer in-kind support such as donated or shared space. 2. Travel costs will be higher because of longer average driving distances for staff to reach consumers across the state or for consumers to drive to the center. As a result, many people may not be able to access the services offered through your program. 3. Shipping costs will be greater than if shipped locally or picked up and dropped off at a regional location. |
| De-centralized Model | <ol style="list-style-type: none"> 1. There are often greater problems with inconsistency in data and services. 2. Difficulty in tracking equipment from various centers, time delay in sending equipment back and forth. 3. There is more variance in availability of equipment. 4. Costs are greater if you want to have duplicate equipment at multiple sites. 5. Staff expertise can be more difficult to find or manage regionally. |

You do not have to choose a single model for both device demonstration and device loan programs. Many programs have found that having a centralized loan program and a de-centralized demonstration program meets their needs more efficiently. This is because a centralized loan library is more comprehensive and it is easier to track inventory in and out of a single location, while demonstration requires greater staff expertise and more personal contact and hands-on experience and should be done in person when possible.

C. Considerations for Cost

Cost is basically divided into two categories: equipment cost vs. operational cost.

Equipment cost cover purchase of inventory and maintenance of equipment. Funding for these items can be periodic. If you have an influx of money, you can increase or upgrade your inventory or add better warranty or maintenance service agreements. When there is no extra money, equipment purchase can be adjusted with understanding of impact on program scope. It is easier to leverage sources for external funding, but often external dollars given to the program from various foundations or agencies are one-time funds for the initial equipment purchase, and there may be restrictions on what you buy and who they want you to serve in the community, such as a specific age group or disability.

Operational costs are annual in nature. They include staff salary, rent, utilities, and other costs that are generally fairly fixed. Once your program model is implemented, operational costs are difficult to adjust. Also, it is more difficult to leverage external funding for these costs vs. for equipment purchase.

Critical Considerations in Program Implementation

There are a few rules of thumb when implementing your program.

1. Know thyself – intimately know your existing resources, internal expertise and what connections you have to work with procuring external funding.
2. Know the other players in your state, such as agencies for the blind, hearing impaired, aging, specific disability associations, early intervention programs, independent living centers, and others. These entities can make excellent partners, collaborators, cross-referral sources, and/or sub-contractors. They may be better able to meet the AT needs of their targeted populations, thus allowing you to focus on other under-served populations.
3. Know where there are existing equipment pools in your state – the vast majority on low-tech end devices like daily living aids are often found at Independent Living Centers, Easter Seals, United Cerebral Palsy, and societies like the Multiple Sclerosis Society, Amyotrophic Lateral Sclerosis and Muscular Dystrophy Foundation, etc.
4. Identify what professional expertise exists in your state, and where you can find these individuals (particularly for higher end equipment like AAC, computer access, low vision aids).
5. Know who will support you in your administration (lead agency, state, vocational rehabilitation) when trying to leverage resources.
6. Have an alternative funding plan ready to keep your program running, particularly for fixed operational costs. If there is no money for equipment in a given year, you do not add to your inventory then, but you cannot eliminate the operational costs.
7. Don't be afraid to mix and match centralized and decentralized options to maximize efficiency. Device loans may work better centralized, while demos may be easier to manage regionally for some programs.

8. Identify a manageable program scope that can be implemented incrementally. Identify your own strengths first and focus on inventory when you have staff expertise and build on this incrementally.
9. Continue to identify external funding is critical to meeting the goals of comprehensiveness and statewideness and is critical for long term sustainability.

III. General Considerations for Device Demonstration Programs

A. To subcontract or Not to Subcontract?

Some states operate their demonstration programs directly while others subcontract these services to other organizations. There are advantages and disadvantages to the different approaches, and many programs have changed their program model over the years to enhance a particular aspect of their program. For example, they may find one model allows them to better reaching their target audiences; find the right administration, and staff expertise; and manage operational costs more efficiently. Not one model works well for all programs, so you have to analyze your current structure and needs and capacity of your state to determine the best approach for your program. Consider the following when deciding whether to subcontract or operate your program directly.

Advantages of Operating the Program Directly

1. If you run the program(s) yourself, you may gain a better understanding of the entire process and daily challenges faced, whether centralized or regional.
2. It is easier to do training and to develop staff expertise if handled internally.
3. Data collection is easier and perhaps more reliable if done internally.

Advantages of Subcontracting

1. Subcontractors may be strategically located around the state, increasing your outreach.
2. Subcontractors may have specific expertise with certain age groups or disabilities and be able to handle their assistive technology needs, allowing you to focus on other populations or areas.
3. Subcontractors may provide in-kind support, such as free space, administrative support and operational costs.
4. Subcontractors may have existing equipment pools that you can use or help to expand to meet your program needs.
5. Subcontractors may increase your visibility and bring more referrals from new sources.
6. Subcontractors may have their own marketing through conferences, public awareness activities, publications, and other venues that can carry your message.

If you do have partners, it makes good business sense to set up Memorandums of Agreement (MOAs) or Understanding (MOUs) with them. When setting up an MOA/MOU, here is some important information to consider:

1. MOA/MOU must clearly delineate roles and responsibilities of each entity (lead agency and partner).
2. MOA/MOU must clearly specify due dates regarding data, success stories, inventory review, etc.(i.e., data is due on the 10th of each month for data collected during the previous month).
3. MOA/MOU should stipulate a primary contact person in order to facilitate smooth and efficient communication.
4. MOA/MOU should provide built-in opportunities for at least one mandatory annual training, as well as technical assistance and on-site visits.
5. Lead agency should make implementation of MOA/MOU easy and straight forward for the implementing entity (i.e., provide data base which implementing entity is to use for data collection purposes and train the implementing entity on its use).

A sample MOA can be found at www.resna.org/taproject/activities/demo.html

Even if you do not subcontract your demonstrations, knowing other device demonstration programs in your state is vitally important to serve the needs of your clients, to meet your program goals, to refer and receive referrals, and to be more comprehensive.

B. Choosing your Target Audiences

Ideally, your program will serve all ages and all disabilities within every corner of your state. In reality, it is not possible to do this, and especially when starting out, you need to decide what your resources are and what the pressing needs are within your state. States may collect this data in several ways:

1. Perform a needs assessment with different groups across the state. Needs assessment information can be used to help states know which equipment is most requested from targeted audiences and whether they would use, support and recommend the program to persons who could benefit from AT. The needs assessment should ferret out what would be considered barriers to usage of the center and AT programs can then use this information to be more customer responsive.
2. Conduct focus groups representing different areas and populations to find out more about your intended audiences. The information obtained from focus groups enable programs to make informed outreach to targeted populations and equipment purchasing decisions. The discussion can result in knowledge regarding unmet needs across the state for specific populations.
3. Ask your advisory council for input on need for specific services in your state. Your advisory council can offer a broad perspective on current services (or lack of), as they represent a cross-section of interested parties, including persons with disabilities.
4. Hold town hall meetings in different parts of the state to gather input from the community at large. Invite stakeholders from different organizations to identify where the gaps are and what services are needed to complement those already offered or to serve populations that are under-served in their access to assistive technology.
5. Determine what resources are already available within other agencies or organizations that you can partner with or that already handle these needs for certain groups.

Relationship-building is key with every component an AT program offers. By working closely with other agencies regarding their clientele's AT needs, AT programs are in an enhanced position to collaboratively make decisions regarding demonstration equipment which best meets an intended audience's needs or fill equipment gaps an agency may have in order to provide a more comprehensive inventory of AT to the agency's clientele.

Those that use your program can be people with disabilities, family members, medical professionals, state and local agencies, school districts, vendors, and employers. While it is ideal to be fully comprehensive and statewide, it is better to focus on more manageable activities that you can do well rather than trying to run too many programs and reach too far without the right quality of service or resources. Once an AT program has studied the disability landscape within their state and gathered input from key stakeholders, including consumers, they must ultimately make critical decisions regarding the type of demonstration program they can support and sustain over

time. While the situation is always fluid and ever-evolving based on emerging technology and changing opportunities, AT programs should be able to justify demonstration program design from sound decision making on key considerations which include: budget constraints, equipment inventory, staffing needs, and space issues.

C. Location and Space Layout

Whether centralized or regional, the building where a device demonstration center is housed affects public awareness. A large storefront on a busy downtown street may invite greater walk-in traffic, while space within the lead agency or another partnering or contracting agency may invite more referrals and may provide in-kind support.

Because space can be expensive, it is critical to maximize its use to best serve your audience. It is important for AT programs to house demonstration centers in facilities which are fully accessible to individuals with disabilities and provide customers with as much scheduling flexibility as possible. Additionally, the demonstration devices should be readily accessible to the individuals who are visiting the demonstration center. This can be accomplished through affordable, careful design of the space in order to allow easy and convenient access to the equipment.

Storage space and floor plan will clearly dictate the layout of the center and may determine what items are purchased or housed there, the number of customers who can be served on an average day, and the manner in which device demonstrations can be conducted. If the demonstration space is small, then creative use of tiered shelving (within reach of consumers) and display racks for multiple items, etc. can maximize the space while providing variety for visitors to see.

If the demonstration area is small, and staff support is limited, then fewer people can be accommodated simultaneously. Larger demonstration centers may accommodate more devices and/or more categories of devices to be displayed. Walk-in traffic of greater numbers could be accommodated, assuming there is staff support available.

Helpful hints:

1. Some programs lay out their AT by rooms to showcase the different areas and applications, such as an adapted bathroom, bedroom, kitchen, or office.
2. Furnishings can be from Goodwill, donations of items, and garage sales.
3. Set up a resource station at the demo center for vendor information and catalogs.
4. Label each device displayed with a laminated sheet or tag with the device name, manufacturer, and approximate cost – it helps with organization and handles basic questions from visitors about cost and use.

D. Offsite Service – Mobile Demonstration

Mobile demonstrations can be used to reach remote populations, particularly when there is only one centralized demonstration center or when the state is too large or very rural so that more people can have access to AT device demonstration. Some states choose to set up mobile units, using vans or trucks, to reach more remote areas also. For details on considerations for implementing a mobile unit program, please refer to the NATTAP website at

<http://www.resna.org/taproject/activities/demo.html>.

Demonstrations can also be performed via distance learning or video conferencing, where the internet or a video conferencing system is used. Video conferencing could be done from a central site to regional centers or to school systems or other agencies, where specialized video conferencing systems or internet and web cameras are used to perform a demonstration at a remote site. This would also assist when there is particular expertise or need for consultation in using a particular device. Ideally, this would work best if the central site and remote site each have the same device in front of them, and the remote demonstration meets the criteria as defined in section I of this document, as required by the AT Act.

E. Hours of Operation

Device demonstrations need to be available on a schedule that meets the needs of a program's customers, both AT users and the professionals assisting users to get the appropriate AT. Whether a device demonstration program will take only scheduled appointments or will accept walk-ins will have ramifications for both staff members and customers. With walk-ins, trained staff must be available upon demand for device demonstration.

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. Again, a well-constructed needs assessment should be able to get at some of this information and then the customer's wants and needs regarding hours of operation must be weighed with staffing flexibility in order to determine hours of operation. Of course, AT programs must make an effort to be as accommodating as possible for those folks who simply need preferential treatment due to medical or other extenuating circumstances.

The traffic pattern of the demonstration center is a factor in determining hours of operation. Centers with high visibility will attract more walk-in traffic and referrals. A major consideration in whether to have set hours and how many is the number of trained staff and their availability. In many cases staff may also be committed to other programs or services of the AT Act program, and not solely dedicated to the demonstration program. A decision on the number of set hours (if any) should factor in who and when staff are available, and if staff job responsibilities for operating the demonstration center will be shifted for certain periods of the day or week. Another consideration relative to after-hours and weekend demonstrations, should be how staff members are compensated (i.e., exempt employees with no overtime, overtime pay, comp time, etc.)

F. Staffing

The AT Act requires that device demonstrations be conducted by individuals who are familiar with and knowledgeable about assistive technologies. This means that recruiting, training, and retaining the right staff members are critical to implementing a well-run AT Act program. For a more in-depth discussion on staff development issues, see the corresponding section later in this document.

G. Determining Inventory

Purchasing devices for demonstration programs will depend on many considerations:

1. Devices purchased need to reflect the target audience for whom the demonstrations will be conducted.

2. Inventory breadth is affected by the amount of money available for equipment purchase.
3. Some devices are more readily available through local vendors or are easier to rent or purchase.
4. Some devices require customization and specialized training to demonstrate, such as high end power wheelchairs or custom seating, and many programs choose not keep these items in their inventory, whereas some programs may keep more basic wheelchairs for general use but refer people to the appropriate clinics and vendors in the area that can better meet their needs for high end and custom equipment.
5. There is great variability in what durable medical equipment (DME) may be demonstrated, depending on consumer demand, and space issues. Some demonstration centers limit their inventory to portable ramps, stair climbers, or lifts.
6. Inventory purchase is influenced by relationships with other programs (whether through sub-contract, MOAs, etc.) that may serve the needs of certain populations or areas within the state. These programs may have specific equipment pools for demonstration or for loan that you can partner with and refer consumers to meet those needs.
7. Equipment that may pose greater hygiene issues, such as stuffed toys or some bathroom equipment, seat cushions, etc., usually should not be part of a device inventory.
8. Devices that require specialized staff expertise in providing demonstration, such as high end technology like some augmentative communication (AAC) devices, computer adaptations, and higher end visual aids should be purchased if staff expertise already exists for demonstration, there is good customer support during loan of a device, or external support is procured to make the demonstration or loan an effective trial.

Some programs will focus on the higher end technology that is more difficult to rent or access, while others will start initially with a higher quantity of mid to low tech devices and build their inventory. Keep in mind that many other agencies that have existing equipment pools often have more low tech devices and items to use for activities for daily living (ADLs). Many programs share equipment (as well as staffing and space) between their device demonstration and loan programs. See the section following for a discussion of inventory for device loan programs, as these will overlap. For more in-depth treatment on specific equipment issues, please refer to the corresponding section later in this document.

IV. General Considerations for Device Loan Programs

A. *Determining Inventory*

The AT devices available in a loan program may vary in quantity and type from those available in a demonstration program, but in many cases it also is possible to share devices between the two activities. If equipment is shared between the two programs, it is critical that equipment needed for demonstration not be loaned out unless there is another available in-house. If devices are going to be shared between programs, it is recommended that:

1. You purchase enough of a more popular item that you have the ability to demonstrate even when someone needs a loan for it or vice versa. This means that you have to track the most popular requests over a period of time (see previous section on choosing inventory).
2. If you don't have enough of an item in stock to allow a demonstration when something is on loan, you need to (1) have a sufficient tracking system to know where the device is and how soon it will be back and (2) have a policy on how you resolve situations in which a demonstration is required for a device on loan.

Again, many of the considerations for choosing devices for a lending library are similar to those for demonstration. Some programs have set the following general guidelines:

1. Try to keep a wide range of generic devices, from low to high tech in order to accommodate the AT needs of a wide array of users whose equipment needs will vary from low to high tech.
2. Determine policies for DME items in your inventory. The DME you keep in your inventory should depend on consumer demand and your ability to store and transport it. Some programs have no mobility equipment available for loan, while others have found that wheelchairs are popular items to keep, and still others limit their inventory to portable ramps or lifts, or keep no mobility-related equipment in their inventory. Keep limited or no inventory of certain durable medical equipment (DME) like wheelchairs or seating components because they may need careful prescription or customization.
3. Do not loan devices that have hygiene or high liability concerns.
4. You may choose to avoid large items that are not "ship-able" or too hard to store, or you can require people to pick these up and drop them off.
5. Do not stock devices that require installation.
6. Re-program devices that are customizable to "neutral."

Some devices in the market don't perform as well as hoped, and the natural inclination would be to not stock these devices. However, some programs stock devices even if they don't believe they are the best market offerings so that it allows consumer choice.

Hints:

1. Consider creating kits of devices which group various categories of products together, such as dressing kits, reachers, and other ADLs, or switch kits. This allows a number of related devices to be tested at the same time to compare and contrast.
2. Consider regional sharing of expensive items that are typically low utilization items so that the burden of cost can be shared and the range of products available can be increased.

3. Include cheat sheets for basic use whenever possible (higher end products typically). Often, short instruction sheets are created in-house but may be available on manufacturer websites.
4. Include a log book along with the device(s) you are loaning with notes about the device, tips on effective use, what comes with the device (components) and a log of any issues or problems encountered with the device so that a history can be maintained with the device.

General Loan Guidelines

Once you have determined your inventory (which is an on-going process, especially as new technologies emerge quickly), you need to consider several details about the loan itself, namely:

1. What is the length of the loan? Programs typically loan equipment for 2 week to 8 week trials. The loan period may vary depending on the length of time needed for an effective trial of that particular AT. If it is not possible to have a sufficient number of high demand and/or more expensive items (e.g., AAC devices), the loan period may be shorter in order to accommodate as many borrowers as possible. Longer loan periods may be needed for more complicated devices or if multiple devices are borrowed because more time may be needed to truly evaluate the effectiveness of the device(s). Some programs loan devices for other purposes, such as temporary use of a device while newly purchased device has not yet arrived, or provide a short term replacement of lost or broken device until the original is received or replaced. Sometimes outdated devices are kept for loan purposes for individuals who may currently own an older model and are temporarily borrowing from the loan center while their device is being repaired. If there is not another individual waiting for that device or it not on the “hot” list, you may allow it to be renewed.
2. When will you extend a loan?
 - Will you extend the loan if another person is waiting for the device?
 - Do you have a different policy on extending loans that are for the purpose of device trial than you do when a device is being loaned as an accommodation or while waiting for a repair?
3. What level of support will a device need to have an effective trial? This should be determined prior to the loan to ensure effective use. You may choose devices for your inventory that do not require too much support or a specialized skill if you do not have this expertise in house. Also, you must determine what support personnel will be required to help the user at home for the trial to be worthwhile.
4. How many devices can be loaned at one time? It may make sense in testing out one type of AT that a better choice can be made when trying several choices for comparing and contrasting. As mentioned earlier, some programs have put together kits in various categories so that a group of devices can be tested at one time.
5. What items can be loaned vs. demonstrated only? There are some pieces of equipment that are not feasible to loan for a variety of reasons: lack of availability for demonstration, size of equipment, complexity of use, hygiene issues, or need for installation.
6. What can/cannot be shipped safely or without great expense? You may need to determine whether to stock these items that are difficult or costly to transport and require them to be picked up at the center, or demonstrate these devices but not loan them, depending on whether demonstrating the device would allow sufficient information for a consumer to make an informed choice.

It is wise to request that individuals sign and agree to certain conditions when borrowing from a lending library. There is a mutual understanding between the two parties about the responsibilities of the borrower, including:

- return of all equipment
- condition of items
- repair/replacement (outside of normal wear)
- legal recourse
- copyright protection
- release
- notice to borrowers not to repair device, not to delete or re-program something already set

Sample loan library forms can be found at the NATTAP website at www.resna.org/taproject/activities/deviceloans.html.

B. Handling Software Loans

Much AT comes in the form of software. Loaning software presents a number of challenges, primarily due to copyright issues. Many programs will lend software to a borrower under certain conditions:

1. The borrower agrees to delete the software if loaded on their own computer and signs a form acknowledging this.
2. Borrower acknowledges that copying software is illegal (and signs a form to keep on record).
3. In some cases, laptops are sent with the loaned software pre-loaded.
4. Some centers purchase multiple software licenses to allow the software to be used on other computers.
5. Another way to avoid copyright issues is to supply demo versions of software are available for trial on CD or downloadable from a manufacturer's website. These demo versions will automatically expire after a trial period or after a certain number of uses.

C. Charging Fees

Sustainability is a concern of all programs. As a way to support the program, some loan programs charge a fee to borrow devices. While many programs do not charge anything, others have found various fees to be valuable sources of revenue. There are a number of reasons why some programs choose not to charge a fee:

1. Many programs are concerned that charging even a nominal fee would be a barrier to many and would reduce the use of the device loan program and prohibit some from learning about or trying assistive technology that would be of benefit to them.
2. There is concern that the increased administrative costs of tracking, collecting, and processing these fees would be prohibitive.
3. Some state agencies and universities do not have the mechanism to charge fees.
4. Rather than trying to determine if or how to set up fee structures for different school systems, some programs find it more fruitful to ask for money directly from the state or local education agencies for equipment purchase that will support the needs of the various school systems.
5. While not asking for fees directly, a "giving" envelope can be submitted to solicit some donations that can be used to offset costs or to provide "scholarships" to help pay for assessments or device.

If you decide to charge a fee (or need to because it is required by your grantor):

1. You can implement a sliding fee scale for those with limited means.
2. You may require a deposit that is fully refundable when the device is returned.
3. You may charge for requests for technology outside of the scope or goals of your loan program.
4. You may choose to charge agencies or professionals that borrow, or you can consider requiring a membership and an annual fee to borrow devices.
5. You could charge for shipping of the device to and/or from the borrower.

D. Training to Consumers and Professionals

Many devices to be loaned are complicated to operate without sufficient training. If individuals borrowing devices don't know how to make them work, their experience will not be helpful.

Therefore, it is important for your program to know what devices in stock require support and what that level of support is, from no support to minimal to substantial. It also is important for a program to determine if and how it can provide the appropriate support for that device (as stated before, it may not be appropriate to have a device in stock if you cannot support it). Consider the following:

1. Require that a device demonstration be given to an individual, before borrowing. Always send the device with the appropriate manuals. However, borrowers should be told to contact you for questions rather than contacting the manufacturer directly.
2. Consider developing "cheat sheets" with simplified instructions for setting up or using a device. Sometimes these are available directly from the manufacturer through their website or by mail.
3. Some instructions manuals are needed in alternate formats. For things like vision aids, most manufacturers should have these available directly from them, but this is not always the case.
4. For items that require a support person, require the borrower to identify someone to help him or her or to request help from the loan program in locating someone. This support person can be professionals in the field, peers, family or friends.
5. Follow-up calls during the loan period can be made from the loan program to the borrower for certain devices to see if further assistance is needed.

E. Tracking Systems

It is important to have a good tracking system in order to collect critical data about how your program is running and where your inventory is at any given time. There are many different ways to track your loan library inventory to keep track of a volume of data and to let borrowers know what you have, where the equipment is, and when it is due back. Using a living database that is updated at each change in status provides an excellent way of tracking your devices, collecting requisite data, and keeping a history on each device and can give valuable information in guiding future decisions on what devices to purchase, the demographics of your borrowers, equipment maintenance and repair issues, and tracking of individual components needed to use a particular device.

A tracking system database can capture information for a number of different categories that can help you collect vital data:

1. Demographic information about borrower, disability, and functional limitations.

2. Info about equipment to capture:
 - Serial #, id #s
 - Product keys
 - Date purchased
 - New or Donated
 - Vendor name
 - Condition of equipment
 - Item for loan or only demonstration/eval
 - List of component parts for a device (power supply, booklets)
 - Repair record to device to keep history, including cost
 - Consent to track sending equipment for center to center
 - Shipping date
 - Projected return date

F. Handling Non-compliance with Returns (the Art of Repossession)

One of the main abuses of a loan program is from those borrowers who do not return equipment on time (or at all). This is sometimes a difficult issue to handle, and different programs have come with several approaches to this problem.

1. Insure your items, or require that the borrower pay for insurance through the shipping company.
2. Ask the borrower to pay to have the item shipped to them, and then make the return shipping free of charge. There is perhaps less hesitation to return an item when it is picked up for free. UPS and other services will pick up devices from a person's home with a call tag.
3. Arrange for staff members traveling to a region where a device is loaned to pick up the device, or to meet at a mutually convenient location.
4. Charge late fees for equipment not returned on time.
5. Offer incentives to your agency borrowers for returning equipment on time, finding lost equipment, award booby prizes – all in fun!

Keep in mind after all of the attempts, you need to budget for loss due to non-compliance with returns, as well as damage, theft, or loss of an item if it is not insured.

Programs need to develop and follow a policy for the steps they take when someone is delinquent. After several attempts are made in good faith to collect the device, there are a number of options to handle non-compliance:

1. Some programs will send up to three overdue notices via mail or telephone first.
2. If there is no response, you can have an attorney send a letter with a final deadline to return the item.
3. Borrowers may lose future privileges to borrow.
4. An invoice can be sent for the replacement cost of the item.
5. In some cases, the local police have been used to help repossess a device.

For more detailed discussion on other equipment issues, such as insurance, warranties, repairs, maintenance, updating equipment, and what to do with outdated equipment, please refer to the equipment issues section of this document below.

V. Budgeting

Though cost is usually the limiting factor, it should not be the first determining factor in initial program design. When designing your program, you want to look at the needs in your state by examining state demographics, the extent other organizations are meeting AT needs, and what professional expertise is available in-house or can be accessed elsewhere. Then, identify a manageable program scope based on funding and staff expertise.

Equipment costs and operational costs should be handled differently in your budget and accounted for separately.

Equipment Costs

Equipment costs are the costs associated with initial purchase of AT, upgrades, maintenance, repair, service agreements, and warranties. Equipment costs are generally periodic because you add to your inventory based on your resources at the time, and it is easy to make rapid changes in inventory as funds become available.

It is also easier to leverage one-time external funding for equipment than it is to find on-going dollars, and sometimes external funding is available specific to one particular technology or disability. If you can leverage external funding that are one-time grants, you can use this money towards increasing your inventory, upgrading equipment, or purchasing warranties. However, this funding is sporadic and does not usually help with your annual operational costs.

Operational Costs

Operational costs are the costs associated with running your center(s). While equipment costs can vary depending on the money you can spend, operational costs are fixed because they include salaries, rent, utilities, transportation, and other categories related to the daily operation of your program. This money often comes from AT Act dollars and are consistently supported with in-kind support from contractors, unless you have consistent external funding, such as a line item in your state budget. This consistent expenditure is one of the major challenges in sustaining a program, because when there is not extra money available, there is little to no new equipment purchased, but staff salary and rent cannot be deferred.—Steps toward successful budgeting include:

1. Spreading staff time over other activities that are supported by other funding or bring in revenue.
2. Cross-training of staff to ensure that equipment in the inventory can be properly demonstrated by a trained professional.
3. Contracting for specific demonstrations and training as needed with medical professionals, such as OTs, PTs, and SLPs.
4. Sub-contracting with carefully chosen partners with specific expertise or locations to improve outreach for demonstration and loan activities (See section III. General Device Demonstration Program Considerations for more discussion on this topic.).
5. Integrate program personnel into existing facilities and staff support as much as possible to reduce rent and utilities cost. This sometimes requires new staff shared across existing programs.

Budget Management

You want to use your money effectively to maintain and sustain programs, update equipment, and maintain a quality program. Following are some management schemes to reduce ongoing cost and prepare for contingencies.

1. Find ways to reduce, or keep stable, your shipping costs. Suggestions include:
 - Charging a one-way fee.
 - Arranging a motor pool of staff to take products to regional locations, or requiring equipment to be picked up.
2. Build a statewide support network stretching from consumers to agencies which support you and are willing to fight for your services. Data on the need for the program on current use of services provide decision makers with important information. These data include: customer satisfaction, loan waiting lists, new users, broadening the contacts of those who care about your program, and public awareness. Strong statewide support provides a safety net for unexpected contingencies.
3. Good management of funds includes contract management. For many programs, directors and administrators do not have this training. It is difficult to know how much to invest in a contract vs. overseeing it. Then, there is the problem of failed relationships, undoing contracts, collecting equipment, and resentment when a relationship fails. Time spent on contract management, reinforcing good contracts and severing bad ones is money gained and program credibility earned.

Every state is unique, and it is likely that parameters and people change over time, so you have to know the important players in your state, what can you get done and what can't you within each activity. Recognize and capitalize on opportunities as they come. This is critical to the successful management of a budget.

VI. Equipment Issues

The complexity and amount of equipment in your inventory should match with staff expertise and resources available. As the depth and breadth of your inventory grows, your staff expertise must keep up with the various technologies.

Guidelines for choosing your inventory are discussed in Sections III and IV. Once you have inventory, there are a number of hints to effective implementation of your device demonstration or loan program with regards to equipment:

1. When you buy a device, make a backup copy of the instruction manual or CDs (may be downloadable also from the manufacturer), because these often do not get returned with the equipment.
2. Sometimes there is a need for alternate formats (esp. for vision-related equipment). Check with manufacturer first for these.
3. Tag each item with a sticker/id tag identifying your program name and number.
4. Consider purchasing the current model of a particular device when a new upgrade is to be released that does not make the current one obsolete. Manufacturers may be willing to give better pricing in these situations.
5. Include cheat sheets and simplified operating instructions with a loaned device, as they are often a great resource for staff and borrowers. These can be prepared by each program, and they are often available on the manufacturer's websites.
6. A follow-up phone call to the borrower within the first week after loan is wise to check on how they are doing and to ask if they might need further technical assistance in order to have an effective trial.
7. Consider building some regional collaboration to share "esoteric" and pricey systems that are used less frequently to leverage your resources.

Once you have determined your initial inventory, there are a number of on-going equipment issues that may apply to both demonstration and loan programs, though not equally in each case.

A. Insurance

Insurance is often available to protect your equipment or space from damage, loss, or theft. When considering insurance, there may be coverage for two things: insuring the facility where the equipment is housed, and insuring a loaned device during shipping. Depending on the type of equipment or where your space is located, the coverage you can purchase will vary.

Insuring Devices at Your Facility (Applies to Both Loan and Demo)

A facility within a university program or state agency may self-insure for theft or damage of property from the premises. Some insurance companies may require motion detectors or burglar alarms to have insurance cover stolen items. Find out if there is existing coverage where you are housed and what the policy states. Some programs having to purchase insurance may limit their coverage due to expense, availability, etc. and some policies will only cover damage done in the event of disaster, such as in a fire.

Insuring Devices Outside of Your Facility (Applies to Loan)

Many programs do not insure items that they ship because they have found it to be cost-prohibitive. They have found that it is rare that a device is permanently lost by the carrier, and it can usually be tracked down. Some carriers will also pay a fractional claim for items that they acknowledge responsibility for losing. Laptops are a particular risk to loan, so some programs restrict sending these out and may only do so with specialized software and other computer access adaptations. If a device is stolen from the borrower, request a copy of the police record to help validate the claim.

B. Warranties

Warranties can be cost-effective for many high tech devices like AAC, Braille note takers, and laptops. AAC studies have shown that there is a high percentage of equipment that needs servicing, often within the first two years. Software maintenance agreements are a good investment because they usually include upgrades. Programs that cultivate good relationships with their vendors can often leverage service agreements or upgrade costs into the initial purchase.

Make sure borrowers don't attempt to repair the device or send it out for servicing themselves, as this may null the warranty. In the initial loan agreement, have the borrower agree to take responsibility for the item, including paying for replacement costs of the items borrowed. For more information on these issues, refer to the previous section on handling non-compliance.

C. Maintenance and Repair

If a device is under warranty, you want to be careful not to attempt any repairs that may void this warranty. Some programs will do limited in-house repair and maintenance, while others out-source this task. The manufacturer technical support staff is a good resource and can help to trouble-shoot a device or caution you to send the device back to them.

Loss of or Damage to a Device while under Loan

If there is wear and tear that is due to "normal use", the consumer should not be liable. However, some of the other challenges faced include:

1. Failure to return components that were sent with the device, including cables, plugs, manuals or CDs, despite packing slips and acknowledgement of receipt. Making backups, purchasing extra components like cable and batteries, including packing slips, and asking borrower to acknowledge receipt of all items initially may help.
2. Borrower reluctance to accept responsibility for damage. Again, asking borrowers to verify receipt of all items in good working order initially may help.
3. Insurance or warranty may cover the expense, depending on the circumstance.

D. Updating Equipment

Having current equipment in your inventory is very important for users to make an informed choice about what AT is available how it could meet their needs. Technology changes rapidly, and not many vendors offer trade-ins or upgrades. Affording the additional inventory or upgrades is often the major challenge. Also, it is difficult to keep track of when devices become outdated. Some manufacturers eliminate their entire line of products and replace them with new ones. Determining when it is worthwhile to repair vs. remove a particular device is another challenge. In order to keep track of what and when to update equipment, here are a few suggestions:

1. Maintain a current, on-going wish list from consumers of products they are requesting throughout the year. Then, if one-time money appropriated from external sources is given, you can quickly add to your inventory.
2. Keep track of waiting lists on devices from your library so you can determine what items are most frequently requested and are in short supply.
3. Attend conferences and trade shows nationally and locally if possible to see new devices.
4. Maintain a good working relationship with your vendors so that they can alert you to changes in their product line.
5. Visit manufacturer websites or assistive technology blogs regularly for discussion on new products.

Outdated Equipment

When a device is no longer manufactured, you need to determine if and for how long to keep it in inventory:

1. If the device is still supported by the manufacturer, it can still be kept available for loan.
2. If the device is no longer supported, you may consider whether to keep it available for specific uses, such as loaning to a user transitioning from one device to another, waiting for funding to procure a new device, or waiting for repair of their current device, which is either the same model or operates similarly.
3. Many programs will take outdated equipment and move it to their reuse program if available, either for recycle or for exchange.
4. Some outdated devices can be given to those that do not have adequate resources to purchase the AT they need.

VII. Staff Development

Most programs agree that staff expertise and retention of staff are keys to success for device loans and demonstrations. Determining the number and responsibilities of staff members may be vastly different for each state. Staffing is based on the program model, the budget, the demographics of the customers served. Staff qualifications will also vary based on the type of assistive technology demonstrated or loaned. Staff expertise dictates what depth of services you can offer and how you choose your program model to be most effective in delivering services within your state. The number of staff, as well as diversity in staff expertise, dictate the level of technical assistance a demonstration and loan program can offer. Cross-training staff to be knowledgeable about the fundamentals of devices across categories can increase your ability to provide services. The level of knowledge of staff should determine the level of complexity that a program can provide.

You may choose to directly employ qualified people, hire consultants or experts as needed, or network with a wide range of professionals in the community. Whether you have a centralized or regional system for demonstrations and/or loans, if qualified people are not available in the centers to directly assist consumers, the depth of services will be affected. Centers may elect to contract with local professionals or experts to provide assistance with highly technical equipment (e.g., power chairs, computer access, AAC). If this is the case, programs may require appointments for demonstration or loan of these more complex devices that meet the schedule of the contractor.

A. *Qualifications and Expertise*

Many disciplines prepare potential staff to work with individuals with disabilities. Education and experience with AT should be an important criteria when considering people for staff positions. The following are disciplines from which to recruit and some skills each may bring to the AT program:

- Occupational Therapy - activities for daily living, home and job site evaluation for adaptation
- Speech and Language Pathology - augmented and alternative communication
- Physical Therapy - mobility, seating and positioning, evaluation and home or job accommodations
- Special Education - educational software and information technology
- Rehabilitation Engineering - fabrication of customized equipment
- Other engineering fields - human factors solutions
- Vocational Rehabilitation - evaluation of job accommodations, business solutions
- Case Management - funding
- Business Administration
- Nursing
- Rehabilitation Counseling
- Therapeutic Recreation-activities of daily living, use of leisure to improve health and well being

Centers can recruit new staff through a variety of mechanisms:

- University posting
- Personnel prep programs
- School district applicants
- National networking
- RESNA job bank at www.resna.org
- State office of personnel
- Listserves about AT
- Graduate students

Graduate students from OT, PT, Speech and language pathology, engineering, and information technology are a vital source for staffing many programs, and it is a win-win situation for both sides. For programs, students provide inexpensive labor for routine tasks and potential recruitment source for staff once they graduate. For students, working at a demonstration or loan program will increase their knowledge of AT, sometimes earning them graduate credit, and allows them to make a connection to potential employers when finished.

Rather than recruiting or developing expertise within the program, many programs have directed their efforts to offering professional development through “Train the Trainer” workshops. These workshops offer specific training to professionals in the community on different AT who then can conduct demonstration or assessments in the area. Some programs have set these up by creating large tools kits for demonstration and training for targeted groups or applications. Others do training to set up a network of providers as collaborators throughout the state, and these trained professionals can provide the necessary services with technical assistance from the demo program.

While the specialized training is important to increase staff expertise, there are other qualities that are important in finding the right staff. These qualities include motivation, interest in AT, and willingness for self-directed study. “The learning curve runs uphill” as one program states.

B. On-going Training

Because technology continues to change, ongoing training is essential to keeping staff up-to-date. For example, staff cannot conduct appropriate demonstrations of new devices they don’t understand. Programs provide ongoing training in a number of ways:

1. Offering in-service trainings from vendors.
2. Providing regular training sessions at staff meetings on particular topics.
3. Assigning specific staff members to research and develop expertise in a particular topic. This divides the training load, and topic-specific training can be given to the entire group, with the person in charge of training becoming the in-house “expert.”
4. Post and archive specific training presentations on your website for future reference, in the form of Powerpoint presentations, podcasts, etc.
5. Using video training and teleconferencing, webinars, and other resources for real-time trainings across the state.
6. Sharing new information with colleagues through e-mail, and listserves.
7. Shadowing of experienced staff by novice staff; mentoring of new staff by experienced staff.

8. Inviting paid speakers to present on specific topics. You can consider opening these training sessions to other professionals across the state rather than limit them to in-house staff to help cover the costs and promote networking.
9. If you have quarterly meetings of regional center coordinators across state, you can do some cross-training on latest devices.
10. Subscribing to on-line training activities from manufacturers, including virtual classroom, tutorials, online self-directed webinars, and podcasts. You may use bookmarking websites like www.google.com/reader or <http://del.icio.us/> to give you updates on AT-related websites so that you do not have to visit these individually.
11. Supporting further education of staff by salary incentives and allowing flexible work schedules.
12. Developing an extensive library of resources – publications, CDs, DVDs.
13. Conducting group studies over the lunch hour or sharing of case studies.
14. Encouraging staff to be proactive in showcasing their own accomplishments. When setting up goals for the coming year, have staff take the initiative to develop their own expertise in particular areas, and then review annually if these goals have been met.
15. Building a multi-disciplinary staff allows sharing of different expertise. For example, staff with engineering backgrounds, computer expertise, or therapy backgrounds all bring different academic training backgrounds. The skills from one discipline can be beneficial to another when these staff are working together.
16. Using open source web-based learning content management systems like <http://atutor.ca/> provides free resources to set up your own courses with your own content with a number of modules, like www.blackboard.com. These systems can also be used to do collaborative efforts; Websites from the other AT Act programs also provide an excellent resource!

Professional Development

Along with informal methods for training staff, programs also should provide opportunities and funding for staff to take advantage of formal training programs:

- 1) Professional conferences at the state and national level offer exposure to new technologies as well as presentations on many related topics from professionals with expertise in their field. Many states offer statewide conferences, and many manufacturers offer local trainings specifically on their category of AT.
- 2) Some universities offer free academic courses as a benefit to staff, or you may be able to apply for tuition support through VR.
- 3) Formal certification can be obtained through RESNA for assistive technology practice, web accessibility, ECU, ergonomics, vocational evaluator, and others.
- 4) Distance learning opportunities offer academic credit or certificate programs.

VIII. Vendor Relationships

Because keeping your demo and loan programs stocked with the latest devices is important, it is critical to cultivate good working relationships with vendors. It is to your mutual benefit to work together to serve the AT needs of people with disabilities. Here are some of the things you should negotiate to receive from vendors with whom you work:

1. Regular inservice training sessions on their products.
2. Updated literature, publications that would be good resources.
3. Invitations to local training opportunities.
4. Advance knowledge of new products or upgrades.
5. Technical assistance in use and trouble-shooting of a device.

In return, there are also expectations that vendors will have of you and your staff:

1. You have properly trained staff to demonstrate their devices.
2. Equipment that is loaned to you is tracked and maintained well.
3. You can provide vendors with feedback on the products and their use.
4. Your demonstration of their product will result in increased product sales.

As you develop a history and trust with a vendor, you may be able to negotiate specific benefits such as volume discounts, free or reduced cost upgrades, service and maintenance agreements, extended warranties, etc. There may also be opportunities for state programs to arrange group buying discounts for some products through negotiated contracts. Consider asking vendors to periodically check your inventory, especially if it is on-line, to see if there are any outdated products (particularly unsupported ones) listed. This will help you to maintain a current inventory and may result in new sales for them!

IX. Marketing

A. General Marketing Principles

Once a device demonstration or loan program is in place, a major concern is attracting professionals and consumers to use it. There are three parts to marketing: advertising (what you pay for), promotion (publicity), and public relations (getting the word out without paying). While this document cannot outline a marketing plan, several general ideas about effective marketing of your demonstration and loan programs are included.

To effectively market your program:

1. Know your product.
2. Create a solid keynote statement about your message (see section on branding below).
3. Identify your audience, including the people you want to help, those you want to work with, developing partners and patrons. Needs assessments, focus groups, and town hall meetings can all assist in determining the needs in the state. Each program must then determine who their audiences will be based on needs across the state, staffing, program structure, other state programs to avoid duplication, etc.
4. Build relationships outside of your comfort zone, i.e. with legislators, school boards, chamber of commerce. Keeping a program in front of decision makers is one of the best ways to market to a diverse audience. Periodically sending newsletters, announcements of open houses, press releases, can build name recognition. Be careful not to inundate groups with information as this may have the reverse effect of what you want.

There are different mechanisms that can be used to spread the word about your device demonstration and loan programs, including:

- Your website (and links to it from others in the state)
- Newsletters
- Articles that you write for others newsletters (professional or disability-related)
- Video/DVD promotional materials
- Listserves
- Brochures to leave with your partners, distribute at shows and conferences
- Exhibits at local shows, malls, fairs
- Tagging onto other disability awareness activities
- “Commercials” before theater movies are available for a reasonable price
- Local TV, radio, newspapers (write the spots for them!)
- Hosting open houses

B. Open Houses

Some programs host open houses as a way of promoting themselves. A successful open house may include the following ideas or activities:

1. Tie your open house into AT awareness week/month as an activity, invite elected officials, others in the area that are involved with AT, potential payors of AT, and disability advocates.
2. When elected officials are invited, circulate pictures of these officials so that staff can recognize and greet the honored guests. These officials may be of help to you when looking for future resources or aid.

3. Know who would likely attend – try to identify audience in advance. Target specific groups, such as school districts, independent living centers, other disability organizations, senior groups, etc.
4. Food brings people! Provide refreshments and spread them around the center to keep visitors moving through.
5. Write up a media release to be given to local radio and TV stations to broadcast. If written for them, there is greater likelihood of the message being broadcast, especially when there are spots to fill.
6. Write articles for the local papers featuring case studies, information about your center, or interesting technology to highlight. If you write it yourself, there is a greater assurance that the information is correct, and it will be prepared in advance when there are spaces to fill.
7. Involve board members in your open house to talk to visitors, invite other people through their connections, and to make them feel a more active participant in the operations of your program.
8. Invite consumers who are AT users to talk about their experience, especially if they are happy with the services they received through your program.
9. Involve inter-agency groups (non-profits in area) who meet regularly and attend their meetings. They can help to spread the word about your services.
10. Send formal invitations and host separate receptions for staff of centers. Follow up thank you notes and pictures if possible to acknowledge their attendance so that they have a second reminder about your program.
11. Identify professionals and consumer groups and host a quarterly open house to focus on a different type of AT. Send a postcard across a “drivable” region near your center to announce the event, since postcards are less expensive to print and to mail.
12. Have trained staff show devices and talk to various groups by giving guided tours or by manning different stations around the center. Set times to overlap end of workday and early evening, or offer at two different times to allow staff from other programs, schools to attend after work.
13. Have giveaways with your name and logo on them. Prepared packets stuffed with information on other programs and some giveaways will make it more likely for people to walk away with a packet and save you time during the event.
14. Advertise planned activities ahead of time so that people can plan to attend at specific times for an activity of interest if they are not able to take too much time off.

C. Branding

When communicating with the public, you are looking for a consistent message with certain keywords that get people’s attention. Branding is burning your program name or slogan into the minds of potential customers. A brand is what results from marketing consistency: the customer comes to expect that the brand will continue to display the same characteristics, and this expectation creates a covenant between the brand and the customer. You may not be able to brand with so many different activities and various contracts and partnerships, but you can send a consistent message about who you are and what your mission is.

1. Find a logo and use it consistently. Sometimes programs end up marketing their contractors better than themselves, especially with recognizable partners such as Easter Seals, United Cerebral Palsy, and state universities. Logos help people who “push the paper” – VR coun-

selors, case managers to recognize your program and refer to it. That can help you to find potential partners, more funding.

2. Matching shirts with your name or logo can be made for all subcontractors and regional sites to build unity to wear at conferences. It is relatively inexpensive, but you might find a sponsor to help pay for them.
3. Make displays to give to subcontractors and partners. Give them the signs rather than asking them to incorporate your name/logo. Give them specific tabletop displays, pull-up displays, etc. with your program name, specific to the activity highlighted.
4. Create templates for presentations and correspondence for all partners to use when delivering your message.

NATTAP, through a sub-contract with ATAP, is working to reduce duplication and to establish a common vernacular that will result in basic terminology, frameworks and templates for programs to use. The information specific to each program can be edited and customized to spread their message.

X. Interaction with Other State Level Activities

Not all statewide AT Programs conduct all state level activities, but many that do integrate or coordinate these activities for better management and to provide better service to the consumer. For example, when a user is looking at the alternative financing programs for purchase of AT, he or she may be:

- Encouraged to set up a demonstration or borrow the item from the lending library first to ensure it is the appropriate device.
- Referred to the device loan program until the loan is provided and device purchased.
- Directed to a recycling or exchange program to see if the device is available there.

Similarly, a person receiving demonstration or borrowing from the loan program may be referred to alternate financing options in their state.

An outdated device from the demonstration program may be:

- Sent to the loan library, not to be used for making decisions but to fill in a gap for users that are waiting for a similar device to come in or be repaired;
- Put into the recycling or exchange program, depending on your state's requirements for disposition of used equipment.

Many programs have found that good links between these different activities benefit all because of sharing of equipment and of training. Some programs require that device demonstration, loan, and recycling activities be conducted from each regional center, or that the center partner with another local agency that runs a similar program. This helps to build capacity and increase networking.

In the cases where the AT Act program does not conduct all of the state-level activities themselves, it is important to be aware of other options in the area and to refer the individual in need to the appropriate resource, so networking and collaboration are critical to meeting the diverse needs of the people you serve. Providing good referrals to consumers to get the services and equipment they need is the key to customer satisfaction, even if you do not directly provide them with that service.

XI. Statewideness and Comprehensiveness

In order to serve all of the people in your state with AT needs, you want to develop a program that is both comprehensive in scope and has good outreach to cover all parts of the state. While this goal is ideal, it is a difficult one to achieve, and concentrating efforts on doing a smaller job more effectively is more important than doing many things poorly.

There are good reasons why you may not serve a certain population within your state, or not have an inventory of certain devices because there is another organization in your state that serves this need well. These reasons may include hygiene issues, safety, need for custom fitting, or other practical reasons. When there are other organizations that meet the needs of certain populations well, or have a good inventory of a particular category of equipment, it is appropriate to focus your efforts to meeting other needs. However, it is important to have a good working relationship with these agencies for appropriate cross-referrals so that consumers are well-served for those categories. Again, staff expertise as well as budget constraints are critical considerations in determining what you can really do well.

In order to do an effective job in making your programs more comprehensive and statewide, there are many things to consider which will be limited by your staff and financial resources and may be built upon over time.

Populations

One of the first tasks is to look at the population of your state and where the major population centers are located. States are all different, with some having large populations of elderly people, Native Americans, or great ethnic and cultural diversity. Geographically, there are also many variances in land mass, topography, climate, socio-economic status, and more. While you would like to provide all services to all people, you will want to look at what agencies are now serving specific populations and are doing it well. You need to collaborate with these agencies, whether you sub-contract with them, work together to better serve them with their AT needs, provide them with equipment or technical assistance, or just refer between your programs. You may then focus on the populations that are underserved in the communities.

Needs Assessment

Whether you are starting a new program, opening a new center, or just periodically inviting feedback from the communities you serve, you can solicit input in a variety of ways.

1. Your advisory council is one of your most important assets. It should be comprised of a diverse group of representatives of a state agency or other entities and users with disabilities who use AT, as dictated by the AT Act. They will help you to identify needs and prioritize your goals to guide your program, and they should meet regularly and actively participate.
2. You need to reach the stakeholders in the communities you want to serve to gain a better understanding of what services are lacking and what populations are under-served. You can host a series of town hall meetings and invite these stakeholders and consumers to provide their feedback.
3. Conduct surveys of current users of your programs to determine what services and equipment are still needed or need improvement.

4. Organize a retreat with your centers or partners to get all parties thinking on the same plane, to discuss their internal workings, inventory, staff training needs, and more to help direct your future plans.

It is very important to grow, build capacity, strengthen your network, look at skills, competencies, and develop the knowledge needed for strategic planning initiatives.

Partnerships

Strong collaborative partnerships are critical to building capacity. Choosing good partners in strategic locations is a combination of knowing the players, what the needs are in the region they are located, the expertise of their staff, their current capabilities and how you can enhance them, and a bit of luck. Some programs may already be housed in a university or a state agency where there are many opportunities for collaboration, and there are many organizations you can look to when choosing partners:

- State and local colleges and universities
- Rehabilitation hospitals or centers
- State education Agencies (SEA), local education agencies (LEAs)
- Vocational Rehabilitation
- Independent living centers
- Individual school districts
- Disability organizations like Easter Seals, United Cerebral Palsy, Muscular Dystrophy Association, Multiple Sclerosis Foundation
- Agencies for the visually or hearing impaired
- Early intervention programs
- Community foundations
- Advocacy groups
- Health care agencies
- Transportation groups
- Agencies on aging, AARP

Depending on the agreement with your partners, whether through formal contracts, MOAs, or regular communication, you want a partnership that enhances the capabilities of both programs. You can choose what kind of support you provide to them:

- You can provide a contracted sum for operations.
- You can give them a sum of money annually for purchase of equipment to serve their population and open their services to others in the area.
- You can provide support in the way of free trainings, technical assistance, publications, and any other marketing tools that help you to do outreach to the community through them.

You will want your regional centers to serve the local populations as comprehensively as possible, and you need for them to collect the requisite data. You will also want to have consistent policies, procedures, and standards if you have sub-contracted with others regionally. If you have regional centers, use them when you are in that part of the state (i.e. town hall meetings, conferences) to support your activities.

In many of these formal or informal partnerships, you may also gain a number of advantages:

- Better outreach
- In-kind support such as space and other operational costs
- Staff expertise in a particular area

You want to choose partners in locations that best serve your population centers and can do outreach. This will depend on the geography of your state, where the major populations live, and what the local resources are. Being near your state legislature can let you invite people in for tours, open houses, and get information on your services and your mission. Local politics dictate what you can accomplish in some areas, and these may not work in other areas.

Outreach to Rural Populations

In states with large rural populations or more challenging geography, there can be a number of other issues that make outreach challenging:

- Mountainous terrain
- Climate extremes
- No satellite or phone service
- Transportation issues – access to vehicles, public transport, cost
- Generally lower income families
- Difficulty in finding local professional expertise in AT

Programs have used a number of strategies to reach rural populations:

1. Setting up partnerships with agencies housed in these areas and providing them with AT training, and perhaps money and/or equipment.
2. Mobile units may be implemented, whether through a formal program or staff members with mini-vans or their own cars. As traveling is expensive, there are a number of ways to maximize the efficiency of a trip. For example, you can make multiple stops, establish a regular visiting schedule at certain facilities, and use the local professional expertise to help you in initial contact and for follow-up.
3. More programs are using or looking into video conferencing. This can be done with webcams via the internet or with special conferencing equipment both at the central location and the local site, such as a local agency or a school. This technology can be used for meetings, trainings, and demonstration if the activity meets the definition of demonstration as defined by the AT Act.

XII. Finding and Leveraging Resources

External funding may be necessary for the sustainability of a comprehensive and statewide program. Programs have used many mechanisms to leverage small and large dollars to broaden reach and to stretch their budget. Examples include:

1. **Income from non-AT Act activities.** Though you cannot use AT Act money to conduct assessments, you can use staff time that is not being paid through these dollars to provide assessment and other services that you can charge for, or to set up contracts with state agencies to do assessments in a number of areas, including:
 - Assessment for schools to meet Individual Education Plans using AT.
 - Worksite and task assessments and job accommodations.
 - Specific training and workshops for professionals.
 - Product feature matching.
 - Assessment for home modifications.
2. **Charging a fee for certain services.** Some programs will charge a fee to individuals to borrow devices or for shipping. Others charge annual fees to agencies and schools to borrow as a way to offset some of these costs. There is always a drawback to charging fees if it is a deterrent to many people who may use your program.
3. **In-kind support.** Look for small and larger ways to leverage in-kind support from your partners. This can be in the form of free rent, storage, telephone, utilities, staff time, sharing of equipment pools, or other resources that save the program in operating costs and benefit both parties.
4. **Partnering with other agencies.** There are many equipment pools for specific populations, such as the deaf and hard of hearing, blind and low vision agencies, libraries, MS Society, and school districts. You can consolidate your efforts and offer to become a storage facility to house their equipment, or to network to broaden your reach and pool your resources.
5. **Early intervention programs.** Many programs have found these programs to be very interested in connecting with them. Partnering with them helps you reach this population and expertise, but these programs often lack equipment or AT expertise that you can provide. They may also provide funding if your equipment helps them to meet their goals.
6. **Regional sharing of high tech, expensive devices.** Some programs have been able to increase access to expensive products that are of infrequent use by sharing these devices and their associated costs with other programs in their region.
7. **Cheap labor.** Graduate students through a local university can be utilized (see staff development section for more discussion). Volunteers from many sources are great resources to anything from ramp building projects to recycling of equipment, checking equipment in or out, and more. You may find more highly skilled volunteers from local trade or technical schools, and setting up internships would give a student job experience and possibly train for future employment.
8. **Microsoft Accessibility Resource Centers.** MARCs are a great jumping-off point for computer access, and many programs take advantage of this opportunity to set up computer access demonstration, build expertise, and stay current on products and accessibility options. Microsoft equips a center with an HP computer running Windows Vista and Office 2007, with video demonstrations and accessibility tutorials, as well as Accessibility CD Resource Sets to distribute.

9. **Universities.** Education facilities may charge a technology fee from students to access their computer labs, and a portion is remitted back to university. If your program is housed in a university, you may be able to apply for a competitive grant offered for tech fees to fund program. The main purpose of the computer labs is for the benefit of university students, but others can use it also, and it provides another demonstration venue on campus.
10. **Telecomm Distribution Programs.** Some AT Act programs have bid to become a center for these programs and have found that demonstration and loan volume will increase due to the additional customers served. It is a good program to partner with, as people needing telecommunications equipment often have other AT needs. Telecommunication Distribution funds cannot be used for administrative costs, but it pays for telecommunication equipment. If awarded the contract, the discounts given for the telecommunication equipment program are extended for purchases of equipment for your loan library also.

External Funding Resources

There are many places where you can go for external funding, but there is competition from other programs looking for money to support their initiatives. Here are some strategies that may help you to leverage funding from various sources.

1. The ideal situation is for your state to recognize how valuable your services are and to set up “permanent funding” through a line item in the annual state budget. This takes diligent effort (and again some luck!), but there are some helpful suggestions to achieving this goal:
 - Find a champion in your state government to assist with a program revision request;
 - Join and interface with other state agencies. A wish list can be used as a vehicle to educate both administration and legislators about programs of value.
 - Look in state plans of all relevant agencies to see what they say about AT, including the Dept. of Aging, Health, Public Welfare, Education, and Labor and Industry. This will guide you in finding ways to work with them, as many of them may have goals that partner nicely with your programs.
 - Invite legislators at all levels to your events, either on special tours, just to drop in, or specifically for open houses and disability awareness activities you may do for public awareness.
 - Collect data! Keep demographics and make calculations on how much money you are saving vocational rehabilitation agencies, Medicare and Medicaid, school districts when equipment demonstration and loan helps people choose the right AT the first time. These agencies have a history of bad purchases, mostly due to not making informed choices or having proper assessments.
2. For devices that are borrowed by other professionals, track and point this out as a rationale to your state department of education and other agencies to show that you are providing a service and cost savings for them. These other agencies could be a potential external funding source or may help you to get a line item in your state budget.
3. While some states do not focus on small grants for several thousand dollars, many do because it can help systems change, or they can open doors to future funding. Small money can create linkages to bigger money. Consistency between your centers allows better collaboration, which helps to pursue external funds.
4. Develop a relationship with the fiscal person at your state education agency. Sometimes there is a pool of dollars that must be liquidated before the end of the fiscal year for programs working with developmental delay or early intervention, part C funding.

5. Some states can access funding from state tobacco settlement funds. These settlements were agreed upon by 46 states over a 25 year period. More information is found at <http://www.tcsg.org/tobacco/settlement/totalfunds.htm> ;
6. Check into victim funds. There may be discretionary funds for service providers to help with evaluation, training, and demonstration for victims of crimes. For more information, see <http://www.ojp.usdoj.gov/ovc/fund/welcome.html>
7. National foundations have local branches to serve the needs of the specific populations they serve. You may be able to leverage one-time dollars, although there may be some restriction as to how that money is spent. Community foundation guides are available in public libraries.
8. Look at the 990's repository to find private foundations that give grants. IRS 990 forms that most non-profits and all private foundations must fill out are public record. For more information on how to find these, visit these websites: <http://www.nova.edu/library/about/collection/990.html> and www.foundationcenters.org.
9. Look for a certified librarian on staff or as a sub-contractor. This could make your program eligible for competitive library improvement grants for reaching special needs populations. For more information about potential grants, visit the Institute of Museum and Library Services website at www.imls.gov.

There are many other strategies for outreach and networking that can lead to new opportunities and possible funding sources. Here is some advice from other AT Act programs:

1. Create a map of potential strategic partners in your area that share your same vision. There are other organizations that have resources that may be compatible, with similar mission, needs, and consumers. Look at when you can collaborate to create a win-win situation. Plant seeds all over!
2. Hold regularly scheduled Town Hall meetings in various locations throughout your state. Many programs have collected new ideas and good feedback from these meetings.
3. Do presentations and exhibit locally anywhere you can get invited, including senior group meetings and conferences, disability expos, booths at county and state fairs, and meetings of disability organizations. Many of these opportunities cost little to nothing and are welcome resources for their attendees.
4. Create opportunities for people to help in any way they can, whether it is with donations, writing support letters, or volunteering their time. Support letters are useful when trying to procure external funds.
5. Work with your state Medicaid to see if you can open a dialogue, provide trainings, and help them to refer people to you as well as possibly providing contractual agreements (though this may work best with reuse programs). Medicaid is also looking at a way to manage their rising costs while meeting the needs of their recipients.
6. Bring in more school systems for tours, to become aware of your services, and to inform their staff of your inventory, training opportunities, and fee for service offerings. School staff often does not have AT training, and many licensed medical professionals (such as OTs and PTs) would welcome the opportunity for training and additional resources. Also, these staff members often work at multiple sites throughout the school district.
7. Stay customer-focused. Your advisory council should have a good representation from AT users, and they often have other local connections.

8. Cultivate and maintain a strong relationship with your primary vendors to keep current with new equipment, receive training, and for support of their products. If you are also vendor-directed, you can provide them with opportunities for increased consumer access, help to properly show their products to the right populations, and provide them feedback that would be useful in future updates. This can also result in better support for your program and increased access to new products, purchasing discounts, etc.
9. Have a strong data collection system, and make sure your partners and centers are consistent in their reporting so that you have valid information to report to those agencies that can provide external funds.

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