

# USAging | 50 YEARS

**Celebrating 50 years**  
as leaders in aging well  
at home

**usaging.org**





# **Leveling Up: Boosting Your Organization's I&R Quality Assurance Practices**

**Information & Referral  
Pre-Conference Intensive**

**July 20, 2025**



# What are you most excited to try while you are here in Chicago?

Bar or pie chart

- Deep-Dish Pizza
- Portillo's (Italian beef)
- Chicago-Style Hotdogs
- Eli's Cheesecake
- Garrett's Popcorn
- Other

**When you think of “QA” what is the first word that comes to mind?**



**On a scale of 1-5, how would you rate  
your organization's QA practices?**



**Thank you for being  
here!**

# Presenters

- **Sara Tribe Clark**, USAging, Director, Eldercare Locator
- **Bernice Hutchinson**, ACL, Aging Services Program Specialist
- **Nanette Relave**, ADvancing States, Director, National I&R Support Center
- **Jennifer Abels**, Inform USA, Director, Standards & Excellence
- **Becky Kurtz**, Atlanta Regional Commission, Director, AAA
- **Mariam Schrage**, Alzheimer's Association, Sr. Associate Director, Contact Center Operations

**USAging**



# What type of organization do you represent?

- AAA
- ADRC
- CIL
- SUA
- National Association
- Federal Agency/Partner
- Other





Find help in your community by entering a location.

Search a location (i.e., street, city, state, zip code, county)



# Eldercare Locator QA Innovations



- Collaborations
- Supervision/Coaching
- Tech advances
- Automated customer satisfaction survey
- QA score card
- Monthly kudos messages to staff

**Eldercare.acl.gov**

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**What is one word that sums up the value of I&R?**

# 2025 USAging Conference

*Information and Referral Pre-Conference Intensive*

## **Administration on Aging Update**

**Bernice Hutchinson**

Aging Services Program Specialist  
Office of Supportive and Caregiver Services  
U.S. Administration on Aging

Chicago, Illinois

Sunday, July 20, 2025

# Overview

- Forecasting an Inspired Future for Information Access
- Legislative Commemoration
- Funding Opportunities
- Future Focus: Information, Referral, Assistance
- Eldercare Locator and DIAL
- The Quest for Quality

# Forecasting an Inspired Future

QUALITY IS FUNDAMENTAL TO ELEVATE  
ACCESS TO INFORMATION, SERVICES, AND SUPPORTS



# Legislative Commemoration

- The Older Americans Act of 1965, as amended
  - July 14, 2025, marked the 60<sup>th</sup> Anniversary of the Act
  - Longest standing comprehensive national framework in US
  - Access to I&R/A is fundamental to the Act
  - Continuous delivery of vital information, services, and supports
  - Focus: Older adults thriving with dignity in their communities
  - Caregiving: Major momentum for OAA's current and future focus

# Funding Opportunities

- FY 2025 Notices of Funding Opportunities released
- Opportunities: Refer to ACL Updates for the Notices
- Implications for I&R/A: Connections to new funding streams to strengthen service delivery fundamentals; improve access to information, services, and supports
- Call to Action: Ensure I&R/A is written into grant applications; focus on information access and quality assurance in every program funding opportunity

# Future Focus: Information, Referral, Assistance

- Focus: Quality, Access, and Back to Basics
- Fundamentals: Every OAA program has a range of information, referral, and assistance functions embedded in their operations.
- Future Implications:
  - Strengthen I&R/A functions across all OAA programs;
  - Standardize cross training, cross data collection, cross referral processes, seamless transfers;
  - Integrate I&R/A into aging network grant proposals;
  - Demonstrate value and impact of the I&R/A experience;
  - Replicate and scale I&R/A best practices.

# Eldercare Locator and DIAL

- Eldercare Locator
  - Celebrating 34 years of operation
  - Focus: platform, database, and design upgrades
- Disability Information Access Locator (DIAL)
  - Transitions to online searches, only
  - New name reflects change in functions and operations

# The Quest for Quality

- Back to Basics and Fundamentals for Information Access
- Promoting I&R/A Fundamentals Across the Aging Network
- Improving a Complex Information Access Landscape
- Examining the Role of Standards, Certification, Training, Person Centered and Evidence Based Practices
- Valuing the Customer Experience in the Era of AI

# Stay Connected

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# ADVANCING STATES



Leadership, innovation,  
collaboration for state  
Aging and Disability agencies.



# ADVANCING STATES



Our mission is to design, improve,  
and sustain state systems  
delivering long-term services and  
supports for older adults, people  
with disabilities, and their  
caregivers.





# NATIONAL INFORMATION & REFERRAL SUPPORT CENTER



## Services

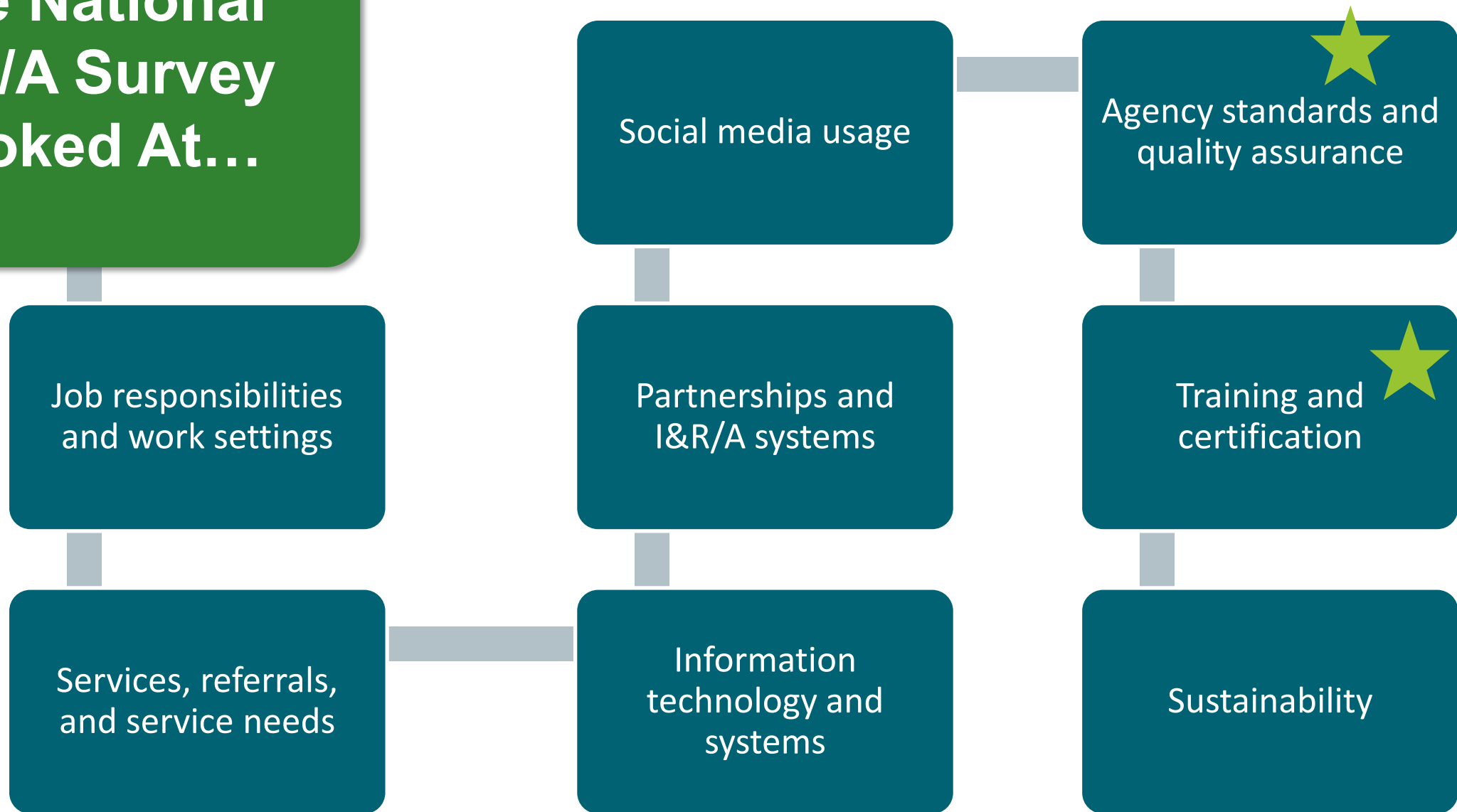
- Technical Assistance and Training Webinars
- Training: Online training; Inform USA certification training; and Train the Trainer
- Distribution lists: sharing information and resources [advancingstates.org/community-opportunities/stay-informed](https://advancingstates.org/community-opportunities/stay-informed)
- National surveys: Aging and Disability I&R/A Networks
- National training events: HCBS and partner conferences



## Goal

To build capacity and promote continuing development of aging and disability information and referral services nationwide.

# The National I&R/A Survey Looked At...



# Professional I&R Standards: The Foundation of Quality Information & Referral

The Inform USA (formerly AIRS) Standards detail the expectations for an I&R service and are the foundation of quality I&R.

- **25 standards** covering all aspects of I&R operation
- First published in 1973
- 10th edition (July 2024)

[www.informusa.org/standards](http://www.informusa.org/standards)

INFORM USA STANDARDS  
AND QUALITY INDICATORS  
FOR PROFESSIONAL  
INFORMATION AND REFERRAL

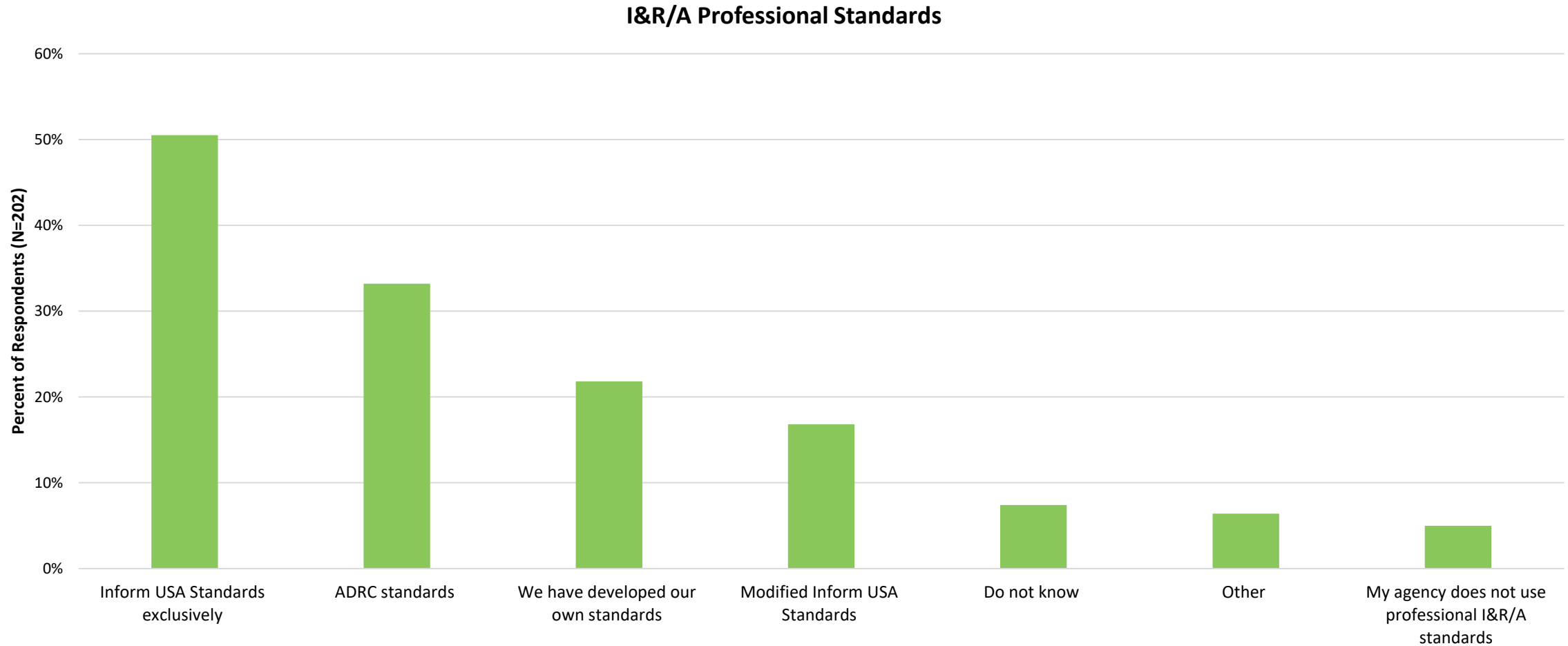


Version 10.0

Published: July 2024

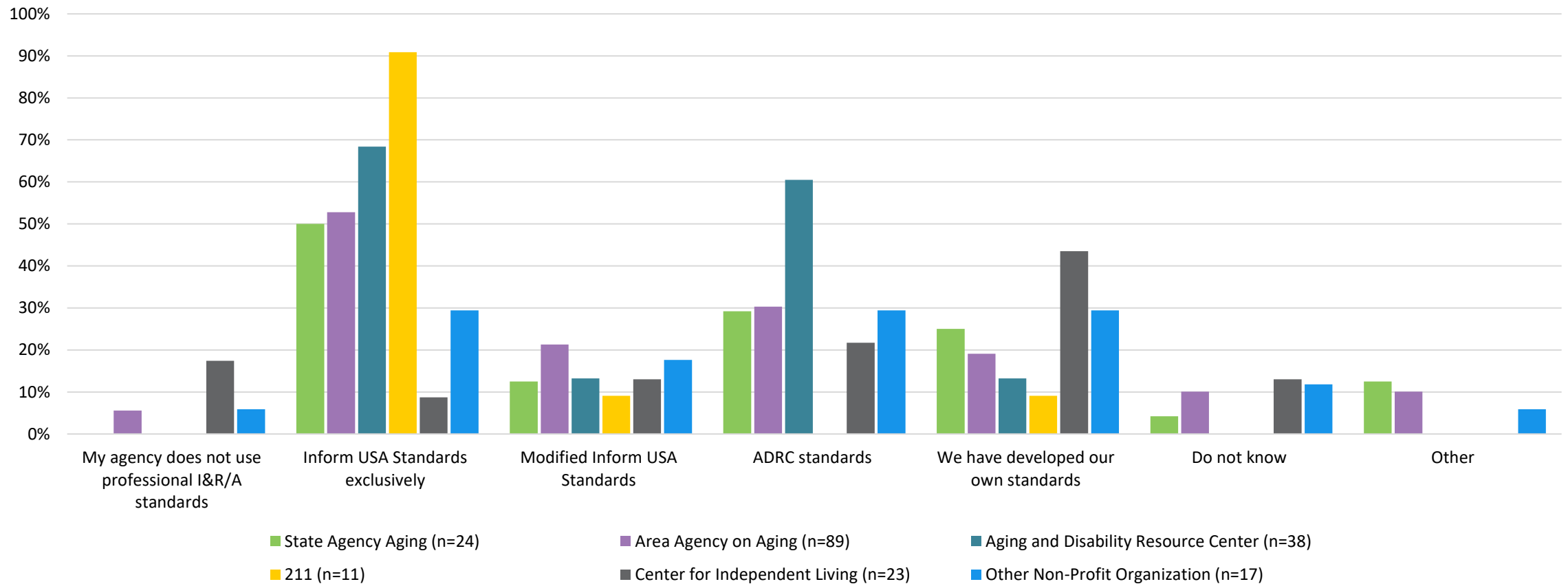
Published by: Inform USA

# What standards are used in the I&R/A field?



# Inform USA and ADRC standards are prevalent in the I&R/A field

Professional Standards for I&R/A by Agency Type





# How do agencies assess contact quality?

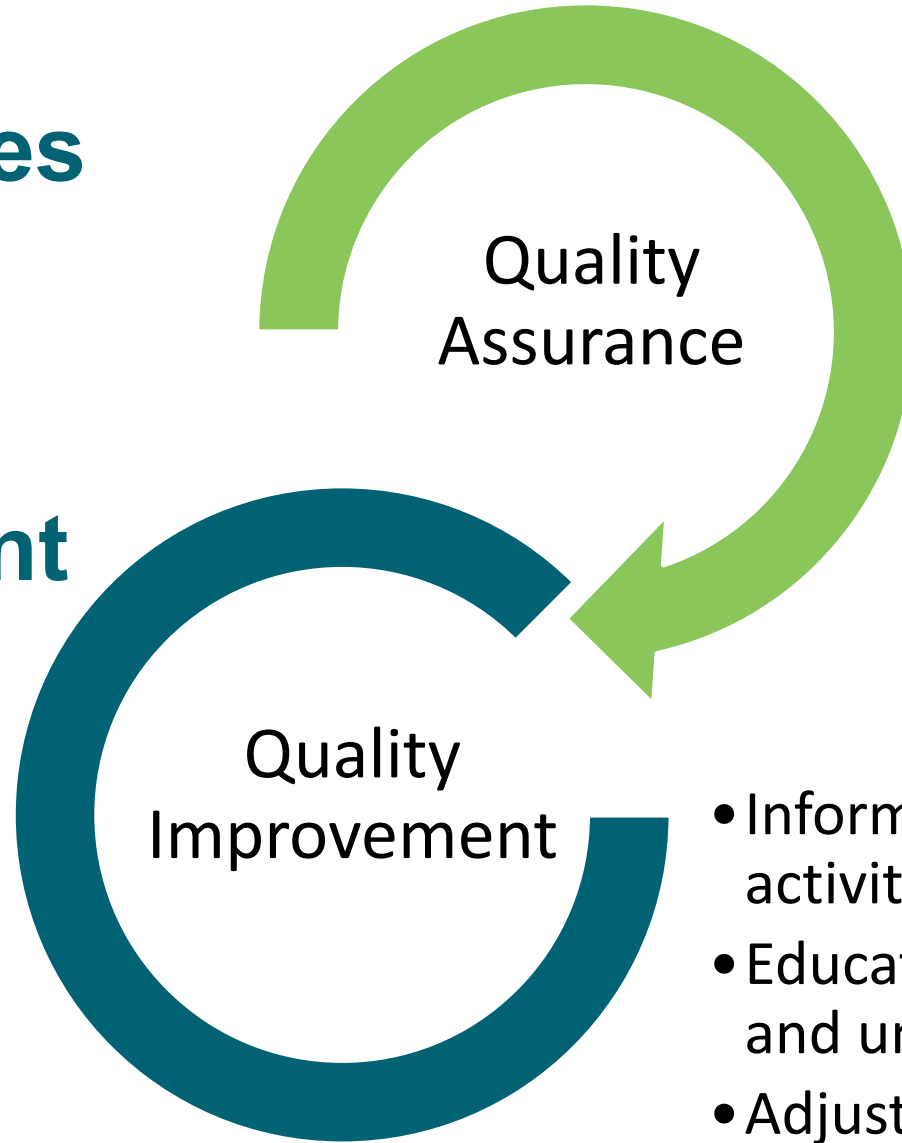
## Most commonly reported practices

- Consumer satisfaction surveys
- Data collection and analysis
- Supervisors reviewing calls
- Consumer follow up calls
- Complaint investigation

## QA practices also include

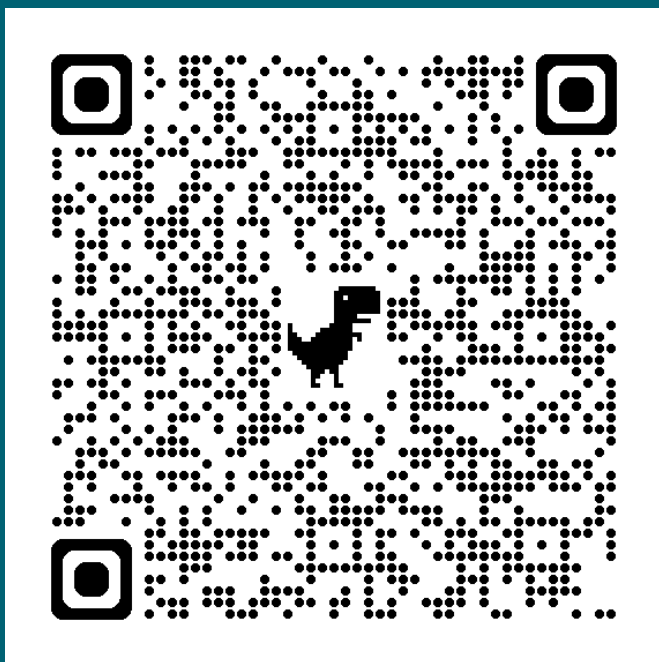
- Site monitoring
- Contract monitoring
- Supervisor shadowing home visits
- Peer review of calls
- Secret shopper
- Interviewing consumers
- Consumer focus groups

# How agencies use QA to support quality improvement



- Informing staff training/coaching
  - Improving customer service
  - Identifying gaps in services
  - Identifying trends
  - Informing policies and procedures
  - Identifying gaps in the resource database
  - Informing outreach/education to the public
- Informing technical assistance activities
  - Educating stakeholders about needs and unmet needs
  - Adjusting service delivery

# For more findings on quality assurance...



**Did You Receive the Help You  
Needed? Quality Assurance  
and Training Drive Practice:  
Findings from the National  
Survey of Aging and Disability  
I&R/A Agencies**



Jennifer Abels  
Director of Standards & Excellence

**I work closely with orgs and quality...**



# Top 5 concerns

- Lack of consistency in assessments (data, method, or frequency)
- Lack of succession planning/training next generation
- Lack of time invested
- Lack of follow-through on results
- Lack of communication with stakeholders

# **Presentation objective:**

Explore practical strategies to improve quality of consumer information and referral programs



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 **ALZHEIMER'S<sup>®</sup>  
ASSOCIATION**

**USAging** | **50 YEARS**

**How do we maintain a person-centered focus?**

**How do we enable staff to be knowledgeable and skillful information counselors?**

**How do we provide staff with  
access to high quality  
consumer resources and  
information?**

**How do we manage high  
demand with limited staffing?**

# How do we collect (and use) consumer feedback?

# **What is the role of supervisors in assuring quality service?**

# What resources or processes support service quality?

How do we measure quality?



# How do we use technology to support staff efficiency?

# Questions?



# Organizational Focus: Inform USA Quality Assurance

# **STANDARDS**

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graph TD; STANDARDS[STANDARDS] --> Accreditation[Accreditation]; STANDARDS --> Certification[Certification]; STANDARDS --> Training[Training];
```

**Accreditation**

**Certification**

**Training**

# Inform USA Standards

- 5 sections
- 25 Standards
- Quality Indicators (3 levels):
  - organizational
  - supervision
  - practice

**\*\*This aligns work across our industry.**

**[Informusa.org/standards](https://informusa.org/standards)**

**INFORM USA STANDARDS  
AND QUALITY INDICATORS  
FOR PROFESSIONAL  
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# Standard 25: Quality Assurance

Organizational level (re. service delivery):

- 25.2 – KPI's for service delivery
  - contact volume
  - average abandonment rate
  - average speed of answer
  - Etc.
- 25.3 – KPI's for CRS's
  - contact quality
  - customer satisfaction
  - data accuracy

**[Informusa.org/standards](https://informusa.org/standards)**



# Standard 25: Quality Assurance

Supervision level (re. service delivery):

- 25.11 – Monitor contact handling KPI's and assess progress on goals
- 25.12 – Monitor contact call taker's KPI's and assess progress on goals
- 25.13 – Train staff on quality strategies and develop team or task force

**[Informusa.org/standards](https://informusa.org/standards)**





# Standard 25: Quality Assurance

Practice level:

25.17 – Call takers provide feedback to database staff re. accuracy of records.

25.19 – Database staff communicate important changes to call takers.

**[Informusa.org/standards](https://www.informusa.org/standards)**



# Organizational Accreditation



# Why Accreditation?

- **Proven Credibility** – Demonstrate high-quality service through independent assessment and alignment with national standards.
- **Enhanced Operational Effectiveness** – Receive tailored feedback and expert guidance to optimize organizational performance, quality contact handling and linkages to accurate community information and resources.
- **Stronger Community Trust** – Ensure the public receives accurate, timely, and verified information from trained specialists.
- **Valuable Partnerships** – Achieve position as a reliable cooperative partner for municipalities, nonprofits, corporations/businesses, and funders seeking excellence.
- **Strategic Advantage** – Gain confidence when applying for grants, bidding for contracts, or responding to emergencies with streamlined, data-informed approaches.

# Accreditation Benefits

## INFORM USA ACCREDITATION

### FOR THE PUBLIC



When you reach out for help, this organization provides top level care, and quality resources.

### FOR STAFF



Demonstrated commitment on the part of your leadership to meeting the highest standards in the field; active participation in ongoing training opportunities.

### FOR THE ORGANIZATION



Internally, it provides quality guideposts for programming. Externally, it signals to partners and the public a third-party validation of services.

### FOR FUNDERS



Your dollars are being well spent; objective evidence/independent review for quality control.

### FOR COMMUNITY PARTNERS



The organization is an industry leader in information and referral; elevates the network of service provision in your area.

# Accreditation Process

5 phases

- Call Review Phase
- Resource Database Review Phase
  - Exciting update on taxonomy!
- Community Survey Phase
- Consultative Phase
  - Clarification on 24/7
- Virtual Site Visit

[informusa.org/accreditation-information](https://informusa.org/accreditation-information)

## **Partnership Accreditation**

- New model expanding the number of orgs that could be eligible
  - Contact Center Application
  - Resource Database Application

[informusa.org/accreditation-  
information](http://informusa.org/accreditation-information)

## **Accreditation Outcomes**

- Data for organizations
  - What is working well?
  - What areas need improvement?
- Expert feedback on how to level up
- Powerful learning

# Call Evaluations





## **Inform USA Call Evaluation**

- 10 secret shopper calls
- Can assess live or recorded calls
- Quantitative and qualitative feedback
- Personalized summary report with strengths and areas of improvement

[informusa.org/call-evaluation-](https://informusa.org/call-evaluation-)



# Team Training





# Inform USA Training

What it is...

- Webinars (live and archived)
- Courses and packages
- Training Manuals (onboarding, CRS, CRS-DC)
- Enterprise (customize your LMS)

Why it is important...

- You never have to reinvent the wheel

[learn.informusa.org](https://learn.informusa.org)



# **Thank you!**

**Jennifer Abels**

Director of Standards & Excellence

[jennifer@informusa.org](mailto:jennifer@informusa.org)

# Standards-Driven I&R/A: Leveling Up Through Certification



## **Certification for Community Resource Specialists in Aging/Disabilities (CRS-A/D)**

Evolved through a  
long-standing  
partnership between  
ADvancing States, USAging  
and  
Inform USA

# How is certification a component of I&R/A quality?

- Certification is a measurement of an individual's understanding of the knowledge and skills required to competently handle client contacts within the broad context of I&R
- Eligible candidates must be working in the field and possess a combination of experience and education that enables them to qualify to take a proctored examination
- The professional credential shows the work is *much more* than answering phone calls





# It starts with a Job Task Analysis

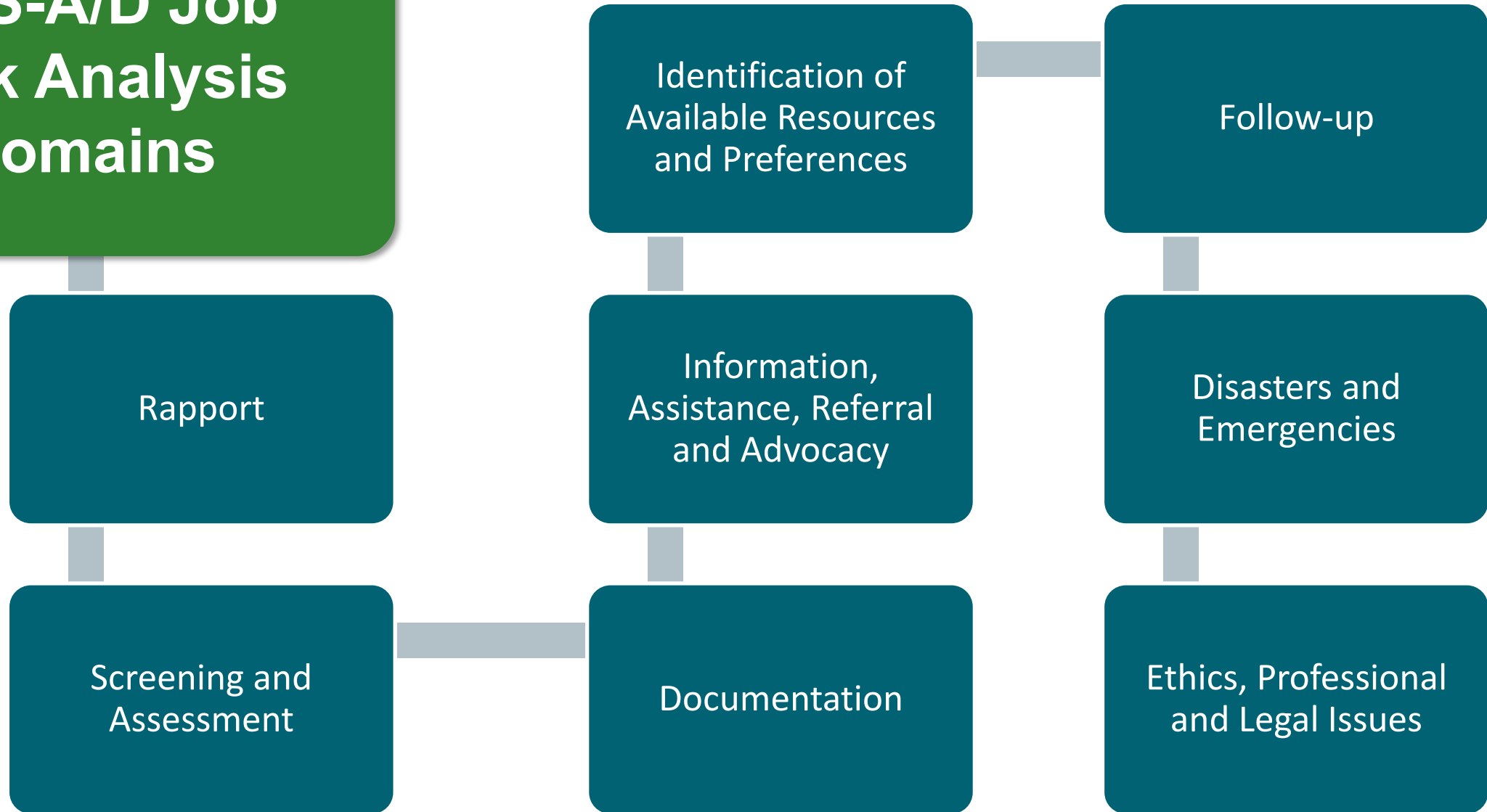
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- Subject matter expert practitioners review and update the CRS-A/D Job Task Analysis (JTA)
- The JTA describes primary domains and their associated tasks, together with the knowledge/skills applied by Community Resource Specialists - Aging/Disabilities
- The JTA reflects the broader roles of CRS-A/D practitioners
- *“Community Resource Specialists - Aging/Disabilities are human service professionals whose skills in communication, problem-solving, and creative thinking provide the critical link between client needs and community, health, and social services.”*

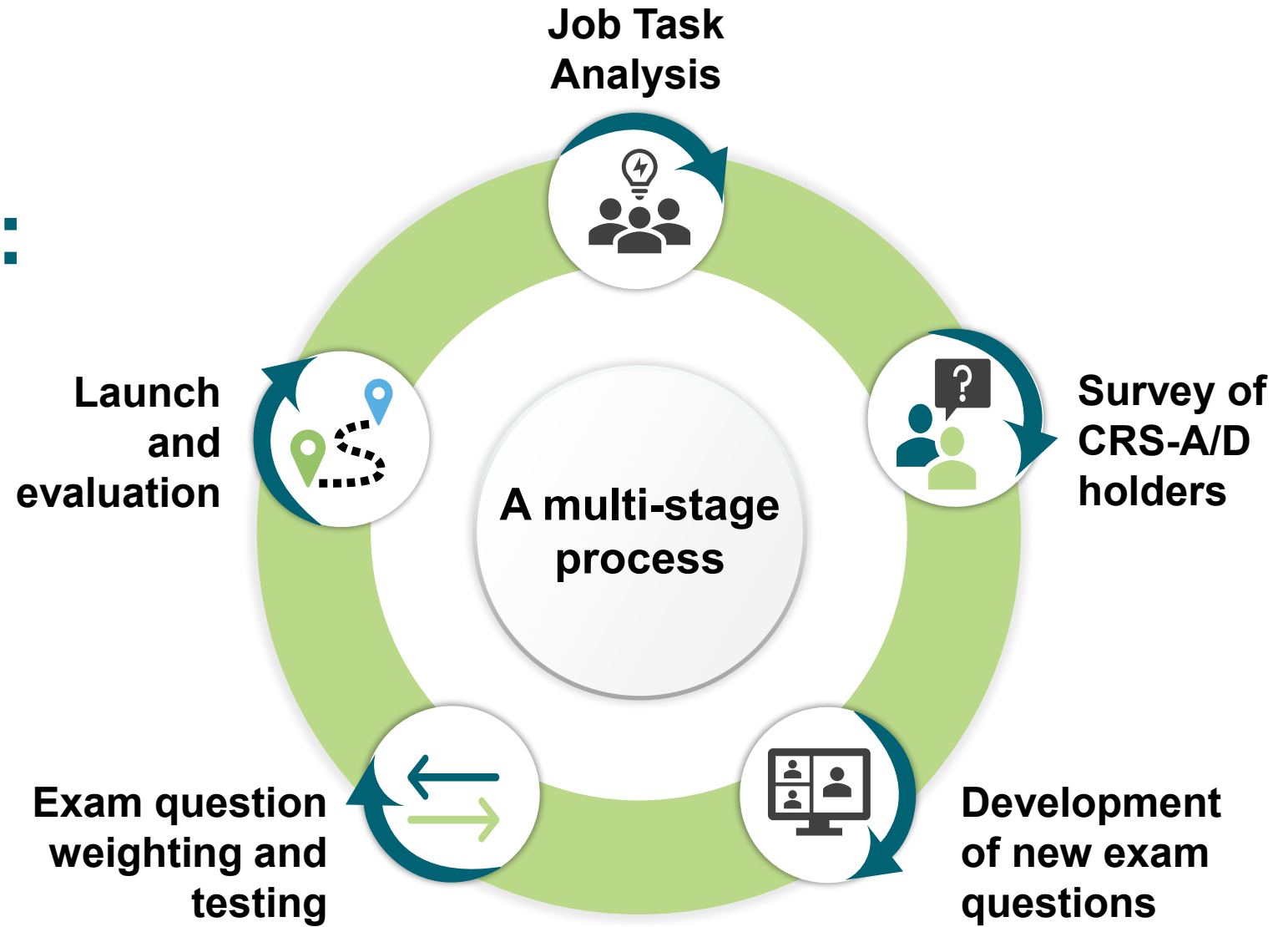




# CRS-A/D Job Task Analysis Domains



# Development of a credential: Many opportunities for involvement



# Professional certification is prevalent in the I&R/A field

I&R/A Specialist Certification Requirements	% (N=201)
All I&R specialists must become Inform USA Certified	48%
My agency does not have a certification requirement	22%
A certain percentage of specialists must become Inform USA Certified	11%
Specialists must complete training, but not necessarily certification, on certain topics	10%
Specialists are encouraged, but not required, to become Inform USA Certified	6%
Other	3%
Specialists must achieve certification in something beside Inform USA Certification	1%

# Resources

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THE CRS-A/D JOB TASK ANALYSIS  
IS AVAILABLE TO ALL I&R/A  
AGENCIES. VISIT INFORM USA

[WWW.INFORMUSA.ORG/NEWS/  
CERTIFICATION-STUDY-  
SUGGESTIONS](http://WWW.INFORMUSA.ORG/NEWS/CERTIFICATION-STUDY-SUGGESTIONS)



CRS-AD EXAM PREPARATION  
ON-DEMAND TRAINING IS  
AVAILABLE ON ADVANCING  
STATES IQ

[WWW.ADVANCINGSTATESIQ.  
ORG/](http://WWW.ADVANCINGSTATESIQ.ORG/)

# Discussion

## Questions

- What is working for your organization?
- What are your QA pain points? What is not working well?
- What are your main take-aways from the presentation today?
- What is one small thing you will try at your organization as a result of this session?

## Report out – “one big thing”

**Thank you and...**

**Enjoy the rest of the  
conference!**

