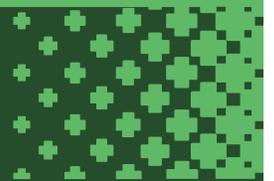




# **HB 264 - Decennial Veterans' Long-Term Care Needs Study**

**After-Action Report for the 2024 Study**



## Objective

---

- This After-Action Report (AAR) summarizes the execution and outcomes of the 2024 Montana Veterans' Long-Term Care Needs Assessment. It includes an evaluation of successes, challenges, and specific recommendations to improve the effectiveness of future assessments. Montana Veteran Affairs Division (MVAD), Department of Public Human Health Services (DPHHS), and veteran organizations such as the American Legion and Veterans of Foreign Wars (VFW) have gathered this feedback.
- 

## Key Successes

---

- **Completion of Statewide Assessment:** Despite challenges, the assessment gathered responses from 3,579 veterans across Montana, providing a snapshot of the veteran population's long-term care needs and preferences.
  - **Valuable Insights into Care Needs:** The assessment provided critical data on veterans' current long-term care utilization, highlighting service gaps, particularly in rural regions, and an anticipated increase in Alzheimer's and dementia care demand.
  - **Increased Awareness of Resource Gaps:** The study underscored low awareness of available services among veterans, highlighting areas for improvement in outreach and access to the support network.
- 

## Challenges Encountered

---

- **Lower-than-Expected Response Rate:** With only a 4% survey response rate, the study fell below the anticipated response threshold, possibly due to survey length, lack of incentives, and limited reach in rural areas.
  - **Resource and Staffing Limitations:** The project faced budget constraints and staffing challenges, with only one staff member managing extensive responsibilities. This limited on-ground engagement and constrained the project timeline.
  - **Limited Stakeholder Participation:** Efforts to host focus groups were hampered by limited participation, and only a few caregivers and family members attended, suggesting a need for more direct outreach and incentive-based participation.
-

## Recommendations

To enhance the quality, engagement, and utility of the study in future iterations, the following suggestions are recommended:

---

- **Re-evaluate Project Oversight:**

- Assigning a lead organization or department more closely connected to the veteran community, such as the Montana Veteran Affairs Division (MVAD), could improve responsiveness and engagement. A team with expertise in veterans' services may be better positioned to coordinate outreach efforts, manage communications, and ensure the study's success.

---

- **Expand Data Depth and Representation:**

- Increase targeted outreach to underrepresented groups, including female veterans, younger veterans, and those in rural areas. Tailor-specific questions on health needs, cognitive health, and long-term care preferences enhance the findings' relevance and applicability across diverse demographics.
- Simplify and balance survey content by streamlining questions, ensuring questions are not too lengthy or unrelated to the survey's core objectives. Streamline content and clarify the purpose of each question in the final report to ensure relevance and reduce survey fatigue.
- While online surveys allow for streamlined data collection, the demographic we engaged often hesitated to share personal data, leading to difficulties verifying respondents as legitimate participants. Future efforts should explore strategies to authenticate respondents and filter out bogus entries, ensuring data reliability.
- Quality Over Quantity in Responses - A common misconception is that a higher number of responses equates to better data. Our demographic achieved strong representation, with responses from nearly every county and efforts to align survey participation with the regional distribution of veterans statewide. While imperfect, this proportional representation provided valuable insights, demonstrating that a smaller, well-represented sample can be just as informative as a larger one.
- Prioritizing In-Person Focus Groups - For this demographic, in-person focus groups are far more effective than virtual ones. Online focus groups proved awkward and challenging, limiting the ability to gather meaningful input. Future initiatives should prioritize in-person settings to engage participants better and foster more productive discussions.

---

- **Implement a Strong Marketing Campaign:**

---

- Develop a robust and targeted marketing strategy to engage a hard-to-reach demographic, with a sufficient budget to cover marketing, printing, and mailing costs. These measures will support broader participation and improve representation among under-represented groups, such as female and rural veterans.
- 

- **Broaden Stakeholder and Caregiver Involvement:**

---

- Stakeholders should be active participants by responding promptly to requests for input and action. Additionally, stakeholders should review reporting materials thoroughly to provide informed feedback and avoid unnecessary misunderstandings.
  - Include caregivers more actively in data collection efforts and create collaborative focus groups involving healthcare providers, community organizations, and veterans' service organizations. This can provide a more holistic view of veterans' needs, addressing gaps in care and support systems.
- 

- **Increase Survey Engagement:**

---

- Broaden Outreach - Partner more widely with community organizations, increase engagement opportunities, especially in rural areas, through partnerships, in-person events, and digital marketing.
  - Offer Incentives - Implement a small incentive program to encourage survey participation.
- 

- **Improve Report Accessibility:**

---

- Create an Executive Summary with Visual Data - Offer a comprehensive executive summary with infographics and key visuals to make findings more accessible and actionable for all stakeholders.
  - Enhance Report Format and Utility – While the current report adhered strictly to statutory requirements, providing additional recommendations and practical strategies would enhance its utility and support informed decision-making. Incorporate a dedicated recommendations section to help policymakers and stakeholders translate findings into practical actions that directly impact veterans' care and support.
  - Provide at minimum 6 months after the survey closes to produce an adequate time for analysis and preparation of the report.
  - Consider transitioning from a 10-year cycle to a 5-year interval to keep pace with evolving needs and demographic changes, ensuring timely, relevant insights.
-

## Budget Considerations

Based on challenges and insights from the 2024 assessment, the following budgetary considerations are recommended for future studies:

- 
- **Incentives:** Create an incentive program for veterans and organizations participating in surveys.
  - **Advertising:** Advertising should include photography and video production, printing, social media campaigns, radio ads, and television ads.
  - **Printing and Mailing:** This was the most expensive part of the project and requires careful budget planning. A non-profit mailing license could significantly reduce mailing costs, possibly cutting them in half. Due to the nature of their communications, both DPHHS and MVAD may qualify. The State Print and Mail team can provide guidance on setting up this license for future projects.
  - **Focus Group and Stakeholder Involvement:** Allocate funds for hosting regional focus groups and structure interviews to gain deeper insights from veterans and caregivers. *Approximately an additional \$5,000 - \$7,000*
  - **Outreach and Engagement:** Enhance survey response rates by supporting broader outreach, particularly in rural areas. Allocate resources to collect more targeted demographic data and address specific needs within under-represented groups. *Approximately an additional \$15,000 - \$23,000*
  - **Staffing and Operational Support:** Consider hiring a contractor to assist with survey development and analysis. Increase the budget for additional personnel or contractor support to improve data collection and on-ground engagement. *Approximately an additional \$20,000 - \$25,000*
  - **Report Design and Accessibility Enhancements:** Improve report accessibility with an executive summary, infographics, and visual data representation. Offer paper copies of reports to each stakeholder and organization. *Approximately an additional \$3,000 - \$5,000*
  - **Statutory Adjustment Recommendations:** Avoid hard setting a specific budget amount. Instead, the budget should account for inflation and other cost adjustments before launching the project to ensure sufficient resources. This budget should also be established during the 2031 Legislative Session to ensure funding is received in fiscal years 2032 and 2033. This will provide adequate preparation time for the study to be published on July 1, 2033 (fiscal year 2034). This budget should be allocated to MVAD for project oversight.

---

**Total Budget Consideration:** It is recommended an **additional** \$53,000 - \$72,000 be awarded for future assessments.

---

## Partnerships and Stakeholders

While partnerships were intended to be a key component in conducting the 2024 Montana Veterans' Long-Term Care Needs Assessment, they were not fully leveraged to achieve optimal outcomes. Key partners, including the Montana VA Health Care System, Area Agencies on Aging, and Veterans Service Organizations (VSOs), primarily distributed study materials rather than engaging more strategically in outreach or focus group creation.

---

### • Challenges and Areas for Improvement

---

- **Delayed Engagement with Key Partners:** Efforts to bring the Montana VA Health Care System on board occurred too late to maximize their impact. This delay limited awareness of the survey among veterans already in the VA care system, likely reducing participation from this key group. *(Stakeholder input)*
- **Disregard for Stakeholder Input on Survey Length and Content:** Several stakeholders expressed concerns about the survey's excessive length and the inclusion of demographic and personal questions that deterred participation. Unfortunately, this input was not fully addressed, which likely contributed to survey fatigue and a low response rate. *(Stakeholder input)*
- **Lack of Outreach and Guidance for Partner Involvement:** No materials were developed to inform partners about the study's purpose or how they could contribute beyond passing out materials. This led to missed opportunities for partners to actively promote the survey, increase awareness, and host focus groups. *(Stakeholder input)*
- **Missed Focus Group Opportunities:** Partners were not utilized to host focus groups, which could have generated valuable insights. Instead, focus groups were conducted independently, resulting in limited caregiver and veteran engagement. *(Stakeholder input)*

---

### • Recommendations for Strengthening Partnerships

---

- **Early and Proactive Engagement with Key Stakeholders:** Engage the major stakeholders early in the planning phase to maximize their role in survey outreach and participant engagement. *(Stakeholders input)*
- **Develop and Distribute Partnership Guides:** Create outreach guides to clarify the study's goals, provide promotional materials, and offer guidance on engagement methods. *(Stakeholder input)*
- **Expand Partnership Roles to Include Focus Group Facilitation:** Actively involve partners in conducting focus groups and local events. Provide resources and stipends to support their contributions. *(Stakeholder input)*

- **Establish a Consistent Communication Plan with Partners:** Schedule regular updates with stakeholders to share progress, address concerns, and keep partners informed and engaged throughout the study.
- **Structured and Collaborative Approach:** MVAD will assign a dedicated point person to coordinate partnership development, which will help streamline efforts. Ideally, this point person, who is well-tapped in with the veteran community, could oversee an outreach team responsible for connecting with potential partners and reporting on progress. The project manager would provide necessary materials and guidance, ensuring alignment with overall project goals. This organizational structure would improve communication, accountability, and the ability to follow up on leads effectively. *(Stakeholder input)*
- **Encourage Participation from Stakeholders:** Stakeholders must thoroughly review reporting materials to stay informed and aligned with project developments. A lack of engagement with these materials led to misunderstandings and surprises when outcomes unfolded, as previously outlined in reports. Active participation and careful documentation review are essential to ensure smooth project execution and informed decision-making. *(Stakeholder input)*

---

## Conclusion

By strengthening partnerships and incorporating stakeholder feedback into survey design and outreach planning, future assessments can achieve broader participation and richer insights from Montana's veteran community.

---

*Kelly Ackerman*  
Kelly Ackerman, MVAD Administrator  
Department of Military Affairs

12/4/2024

Date