Report of the Quality Indicators Development Team

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Introduction

The purpose of this Pass It On Center (PIOC) initiative is to develop Indicators of Quality for Assistive Technology Reuse (IQ-ATR) programs of all types. These indicators define promising practices that contribute to successful accomplishment of the stated mission and sustainability for the program.

The Indicators of Quality are being used in the development of an Online Program Assessment Tool. The Online Tool will provide ease of access for the assessment of a program’s status in meeting the key factors for consideration for each Indicator of Quality. Use of the online tool will not result in a score, but will create references to specific content in the Pass It On Center Knowledge Base for each Indicator in which the program does not meet all of the key factors for consideration.

Participants

The initiative was led by Joy Kniskern and Carolyn Phillips of the Pass It On Center, with Lindsey Bean, a resource shared by Paraquad and the PIOC, coordinating the development process. Sharon Meek and Alan Slemons are developing the Online Program Assessment Tool. Trish Redmon is responsible for editing the IQ-ATR and referencing the indicators to Knowledge Base content.

Initial IQ-ATR Development Team

The first draft of the IQ-ATR was developed by Brian Bard, RSA; Lindsey Bean, PIOC and Paraquad; Jessica Brody, PIOC; Connie Freier, Georgia Tools for Life; Joy Kniskern, PIOC; Lisa Kosh, NATTAP; Samantha Massengale, Roosevelt Warm Springs Institute for Rehabilitation; Kerri Morgan, Washington University/Paraquad; Liz Persaud, PIOC; Rhonda Perling, Georgia Tools for Life; Carolyn Phillips, PIOC; Trish Redmon, PIOC; Martha Rust, Georgia Tools for Life; Cathy Valdez, Project MEND; and Joanne Willis, Touch the Future, Inc.

Other major contributors who critiqued the original draft were Jeremy Buzzell, U.S. Dept. of Education, and Rik Opstelten and Nancy Meidenbauer, RESNA/NATTAP.

After review by the National Task Force, the language of the draft was reviewed by a team that included Lindsey Bean, Kerri Morgan, Rik Opstelten, Brian Bard and Trish Redmon.

Development Process

After two PIOC Webinars on the subject, a Quality Indicators Development Meeting was held in Atlanta on March 23 and 24, 2009. The initial development team (see preceding section) identified categories of quality indicators relevant to AT reuse and recommended an initial set of indicators for each category. The initial document attempted to define progress toward the promising practice along a five-point scale (implemented in narrative in a five-cell table). The draft was distributed to the participants and to interested parties at RSA, NATTAP and RESNA.
Developing the Indicators

The initial format was altered in response to comments and suggestions from early readers of the draft. Many found the five-cell table choices both strained and restrictive. The format was altered to a checklist that allowed a flexible number of choices. At the time it was assumed that the flexible format would facilitate development of the proposed Online Program Assessment Tool, but it actually introduced some new difficulties that would be identified later.

The distribution of the initial draft resulted in significant contributions from individuals who had not participated in the development. Those contributions ranged from critique of the intent of specific indicators to suggestions for changes in language. Other suggestions noted the absence of indicators in some areas, and suggested grouping the indicators by the types of programs to which they apply. Identifying whether the indicator applies to a program because of its organizational type and the reuse activities in which it engages became a serious implementation hurdle for the Online Program Assessment Tool.

A revised draft was presented to the National Task Force on May 6 and 7 in Atlanta. The group recommended a thorough review of the language of the indicators. Lindsey Bean, Kerri Morgan, Rik Opsteltin and Brian Bard were charged with this responsibility. They met via telephone and recommended additional changes in language.

Indicators were added for state-wide programs, and an updated draft was created.

Weighting the Indicators

Prior to development of the Online Program Assessment Tool, Carolyn Phillips led an exercise to weight the indicators. Using Survey Monkey, program leaders were asked to assign prioritize categories for order of importance and to rank the indicators within each category for order of importance.

Developing the Online Program Assessment Tool

Users of the Online Program Assessment Tool will complete a very brief profile of the program, but will not be asked to identify it. The assessment results can be saved if the user wishes.

In attempting to weight responses, it became apparent that the flexible number of responses that made use so easy would make weighting a practical impossibility. A return to the five-cell format of the original draft was considered, but it resulted in strained choices and cumbersome reading for the use of the online tool. To retain the ease-of-use of the flexible number of factors, an alternative set of standard responses was chosen. The user would read all of key factors for consideration in meeting the quality indicator, then decide whether the indicator did not apply (because of organizational type or reuse activities), or whether the program met none, some or all of the factors.
Programming of the Online Program Assessment Tool commenced at the end of July. Evaluation of a program with the tool will result in a package of references to facilitate program improvement. This highlights the gaps in the PIOC Knowledge Base of information about promising practices. Before the tool is comprehensive, content must be collected or developed to guide programs toward promising practices.
Indicators of Quality for Assistive Technology Reuse

1.0 Organizational Structure and Governance

Rationale: A program may achieve success in any (or no) legal structure, but its structure and form of governance should be chosen after considering the legal, tax and liability implications that flow from the decision.

1.1 Organizational Structure

The AT reuse program is an independent established legal entity, is part of an organization that is an established legal entity, is operated by a government agency or educational institution, or has an alternative structure with acceptable legal, tax and liability implications.

Key Factors for Consideration

The program is incorporated under state law, or is operated by a government agency. The issue is not one of choice of organizational status (as in for profit or nonprofit), but of the need for some degree of protection afforded by the most appropriate legal status.

1.2 Governing Body

The organization (or the AT reuse program if it is part of an organization with non-reuse activities) has a governing body that provides counsel, oversight and support for the program.

Key Factors for Consideration

The program has a Board of Directors, or a comparable group, to provide counsel, oversight and support.

- Whether independent or part of a larger organization, the AT reuse program has a separate governing board or advisory body. (A government agency will not have a board, but may have an Advisory Council that does not govern or oversee, but merely recommends.)
- AT users are included among other community representatives.

1.3 Staffing Model

The program has a staffing model that allows it to perform the AT reuse activities in a professional manner and without undue exposure to liability.

Key Factors for Consideration

Most program functions are performed by employees, with volunteers and/or contractors assisting in some aspects of the operation. This assumes that the greatest consistency in procedures and services is present when control is exercised by an employee. However, if appropriate policies, procedures and training are in place, the same degree of professionalism may be present when volunteers or contractors perform key roles or most or all of the activities.

1.4 Involvement of People with Disabilities

Individuals with disabilities are involved in critical aspects of the AT reuse program.

Key Factors for Consideration

The involvement of people with disabilities is assumed to heighten sensitivity to the issues and circumstances of serving others with disabilities. For that reason, it is desirable to involve people with disabilities:

- On the Board of Directors and/or Advisory Council (if they exist)
- In the acquisition of used AT
- In customer intake or determination of eligibility
- In matching clients to appropriate devices
• In training customers to use the devices
• In providing follow-up technical assistance
• In marketing or promoting the services of the AT program

2.0 Sustainability (and Program Outcomes)

Rationale: The program should pursue strategies to sustain itself for the long term, and to continue to improve and expand its services. "Consumer, family and/or advocate satisfaction is a measure of service effectiveness. Successful organizations are consumer oriented and incorporate consumers in the process of evaluating quality of services and future directions. Information obtained from consumer input should be used to modify service delivery practices on an on-going basis." -- SMART

2.1 Sustainability Planning
The program has a sustainability plan that is a written, well-developed document.

Key Factors for Consideration
The program has a written, well-developed plan for long-term sustainability that addresses:
• Diversification of sources of income
• Strategies for enhancing community support
• Retention of employees and volunteers
• Succession planning for program leadership

2.2 Program Statistics
The program collects output data (e.g., number of devices distributed, number of devices donated, number of customers served).

Key Factors for Consideration
The program uses a computer database to collect data, follows the data and looks for trends in:
• Number of customers
• Devices donated
• Devices distributed
• Needs not met

2.3 Program Outcome Data
The program uses an outcome measure and collects data from participants about if and how they use the device they received from the program (participation of person, quality of life, how they use the device, if they are satisfied with the device and services received).

Key Factors for Consideration
The program has a formal outcome assessment protocol in place that includes a study design with valid and reliable questions in an appropriate form, used by trained staff.

2.4 Program Evaluation Plan
The program uses the output and outcome data to modify the program.

Key Factors for Consideration
The program collects data and shares it within the organization to drive a continuous improvement process and it also uses the data to support requests for new or additional funding.
3.0 Program Operations

Rationale: Program operations are the basic activities and services of the program. These define a program, and the quality of services can differentiate good programs and great programs. These activities need to be executed in the manner that serves consumers to the highest level possible.

3.1 Facilities: Accessibility
The program’s facility is physically accessible for employees, contractors, volunteers and customers.

Key Factors for Consideration
The facility:
- Complies with federal and state laws for physical accessibility
- Is served by public transportation, or has made provisions for transporting customers to the location (through a program service or another available service)

3.2 Facilities: Safety and Security
The facility is safe and secure for employees, contractors, volunteers and customers.

Key Factors for Consideration
The facility is located in a place that:
- Is safe for employees, contractors, volunteers and customers
- Complies with building codes and other applicable ordinances
- Holds required drills for fire, weather and evacuation
- Has implemented policies and procedures that prevent customers from entering work and storage areas, and
- Uses secure storage for chemicals and tools

3.3 Facilities: Space and Services
The facility has adequate space and services to conduct the chosen AT reuse activities.

Key Factors for Consideration
The facility has:
- A separate area for administration and program records
- A private area for customer intake (if applicable)
- A separate area for device matching (if applicable)
- A separate area for device refurbishing (if this is a program activity)
- Appropriate areas for unloading and loading equipment (if applicable)

3.4 Device Tracking (Inventory)
The program uses an accurate and efficient method to track the inventory of available devices.

Key Factors for Consideration
The program uses written policies and procedures for inventory management that include:
- The unique identification of every donated device (by paper label or bar code)
- The ability to determine the availability of devices by type
- The assignment of an inventory valuation to each device
- The ability to identify devices subject to recall notices
- The ability to identify customers who have received devices subject to recall notices

3.5 Device Valuation
The program has written procedures that are applied consistently to value donated devices for inventory and reporting.
Key Factors for Consideration
The program uses written procedures and a consistent method to value donated devices for inventory (accounting) purposes.

3.6 Rev. 3-August-2010 (Requested by National Task Force, May 2010)
3.6 Management of Device Recalls, Market Withdrawals and Safety Alerts
The program has written procedures that are applied consistently to track device recalls, market withdrawals and safety alerts and to identify and contact individuals who received devices from the program that are affected by such notices.

Rationale: If a device that was distributed to a consumer through the program is recalled, withdrawn from the market or the subject of a safety alert, the program has a responsibility to inform the consumer. The inability or failure to do so may be a liability for the program.

Key Factors for Consideration
The program:
- Has a method to monitor device recalls and alerts (e.g., subscribes to FDA e-mail notification of device recalls, market withdrawals and safety alerts and manufacturer’s suggested method)
- Has identified a staff member who is responsible for monitoring device recalls and alerts (and included this activity in the job description of that individual)
- Can identify devices that are, or were previously, in inventory that have been the subject of recalls, market withdrawals or safety alerts by the FDA
- Can identify users of devices that have been the subject of recalls, market withdrawals or safety alerts by the FDA
- Has a process in place for quickly notifying users of devices that have been the subject of recalls, market withdrawals or safety alerts
- Will attempt to make changes to the device if recommended by the manufacturer in the notification process
- Will attempt to replace (temporarily or permanently) the device if it is recalled or withdrawn from the market for safety reasons

3.7 Donated Equipment: Acceptable Devices
The program has implemented written policies and procedures specifying types of devices that will be accepted for donation.

Key Factors for Consideration
The program has implemented written policies specifying the categories of devices that will or will not be accepted for donation, and has literature designed to communicate the policies to prospective donors.

3.8 Donated Equipment: Confirmation of Donor’s Ownership
The program has written policies and procedures that are applied consistently to confirm that the donor has the right to sell or donate the equipment.

Key Factors for Consideration
The program has a formal (written) process for confirming the donor’s right to sell or donate the equipment.

3.9 Evaluation of Used Devices
The program has written, device-specific procedures that are applied consistently for evaluating the repair and refurbishing needs of donated equipment.

Key Factors for Consideration
The program has written, device-specific procedures that are applied consistently for evaluating equipment for repair or refurbishment.

3.10 Sanitization of Donated Equipment
The program has written sanitization procedures based on sound medical or scientific practice and that are consistent with the manufacturer’s recommendations for the sanitization of equipment.

Key Factors for Consideration
Donations are sanitized using:
- Device-specific, written procedures
- Tools, chemicals and processes that are consistent with the manufacturer’s instructions
- A work area that has adequate plumbing and air handling facilities

3.11 Refurbishing Donated Equipment
The program has implemented a written procedure for refurbishment/repair of equipment/AT that is consistent with manufacturer instructions.

Key Factors for Consideration
Donated devices are refurbished using:
- Device-specific procedures that do not alter the original manufacturer specifications
- Written procedures that specify tools, chemicals and/or processes consistent with manufacturer instructions
- Trained technicians

3.12 Data Removal from Digital Devices
The program has written policies and procedures that are consistently followed to remove stored data from computers and other digital devices.

Key Factors for Consideration
The program has written policies that are consistently followed for deleting stored data from computers using software specifically designed to ensure permanent data removal in a manner compliant with the DOD standard. Data is removed from other digital devices (e.g., cell phones, PDAs) in the manner specified by the manufacturer.

3.13 Software Licensing Compliance
The program has implemented written policies and procedures that are consistent with current law and licensing agreements when loading software to refurbished computers.

Key Factors for Consideration
The program has written and implemented policies and procedures for the loading of licensed software that:
- Have been checked to ensure compliance with current law
- Comply with the software publisher’s licensing agreements
- Track the purchase and assignment of licenses
- Reload programs only if the original software is provided with the computer

3.14 Limited Warranty for Refurbished Devices
The program offers a limited warranty on refurbished devices.

Key Factors for Consideration
The program offers a limited warranty on refurbished devices that permits the user to return the device for refund (if a fee was paid) or replacement with an equivalent device within the specified time period.
3.15 Storage of Donated Equipment
The program has adequate space and services to store donated equipment appropriately.

Key Factors for Consideration
The facility has adequate space and services:
- For the proper separation and storage of different types of devices
- To optimize the use of space with adequate shelving, bins or other storage options
- To separate sanitized from unsanitized equipment
- To provide proper heating, cooling and ventilation for equipment storage as needed
- Materials handling equipment to optimize the use of space

3.16 Transportation of Donated Equipment
The program has implemented a written procedure that is applied consistently for picking up donated equipment.

Key Factors for Consideration
The program has written procedures requiring that:
- Drivers have current licenses and safe driving records
- Drivers and other workers who pick up donated equipment are trained in safe lifting and handling techniques
- Vehicles used to pick up donated devices have proper loading features and/or accessories (lifts, dollies, lift truck, as needed)
- Workers are trained in appropriate procedures for dealing with donors (e.g., courtesy, giving receipts to acknowledge donations, etc.).

3.17 End-of-life Recycling
The program has a written procedure that is legally compliant and applied consistently for disposal of end-of-life and non-usable equipment/AT.

Key Factors for Consideration
The program has written policies and procedures for end-of-life disposal and recycling and has identified and uses recyclers that comply with environmental regulations.

3.18 Program Web Site (not Exchange) Accessibility
The program’s Web site is compliant with W3C Web Content Accessibility Guidelines.

Key Factors for Consideration
The site has been tested and is compliant with the W3C Content Accessibility Guidelines.

4.0 User Services
Rationale: “If technology-related services are to enable an individual with disabilities to be more independent, productive and integrated, they must be designed around the individual’s needs, not the needs of the agency. . . Assistive technology services and devices should be readily available and accessible, with activities selected to fit into a person’s life, enabling him/her to become more productive, independent and integrated into the community.” -- SMART

4.1 Customer Intake
The program has written policies and procedures that are applied consistently for application for services and determination of eligibility.

Key Factors for Consideration
The program has written, implemented policies and procedures for customer intake that include:
• Written standards for determination of eligibility
• Written referral procedures
• Written application for services that includes demographics and financial information
• Staff training in compliance with privacy laws
• Monitoring and enforcement of compliance with privacy laws
• Staff training in customer service
• A computer database for maintaining customer records
• If appropriate, information about sources of funding for the customer

4.2 Matching Device to Customer
Appropriately trained professionals follow documented procedures to match customers to devices.

Key Factors for Consideration
The program has documented procedures based on standard professional practices and uses professionals that have training appropriate to the situation, the technology solution and the individual to match customers to devices. (The professional may vary, depending on the situation and type of technology, and may be a physical therapist, occupational therapist, assistive technology professional, speech language pathologist, assistive technology supplier, rehabilitation engineer, or ergonomic specialist.)

4.3 Customer Choice
The customer and direct support provider(s) are informed of all appropriate device options and are allowed to participate in the choice of device.

Key Factors for Consideration
The device selection process includes:
• Showing the customer all available options in appropriate devices
• Allowing the customer to participate in the choice of device
• Allowing the direct support provider(s) to participate in the choice of device

4.4 Customer Training on Device
The customer and his direct support provider(s) are given basic training on features, operation, maintenance, safety and troubleshooting for the device at the time the device is given.

Key Factors for Consideration
Training is offered on the assigned device that:
• Is accessible to the customer
• Includes the direct support provider(s)
• Explains the features and safe operation of the device
• Explains basic maintenance procedures for the device
• Explains troubleshooting and support techniques

4.5 Customer Trial on Device
The customer is given a trial period with the device.

Key Factors for Consideration
Trial use of the device is permitted at the program facility and in the environment(s) in which it will be used.

4.6 Technical Assistance
A trained individual will respond to a new user’s request for technical assistance within 48 hours.

Key Factors for Consideration
When technical assistance is requested, it is given:
- Preferably in person
- By a trained individual
- Within 48 hours of the request

4.7 Equipment Delivery to Customer
The program delivers assigned devices to customer.

Key Factors for Consideration
Equipment delivery is provided throughout the entire service area for all types of devices.

4.8 Trained Delivery Staff
The program uses delivery personnel who are trained to handle equipment properly and to interact with the customer or direct support provider(s).

Key Factors for Consideration
Drivers/delivery personnel are trained in:
- Techniques for lifting and moving equipment safely
- Equipment setup
- Obtaining acknowledgement of receipt from customer
- Obtaining liability releases from the customer.

4.9 Customer Follow-up
The program provides follow-up by trained staff.

Key Factors for Consideration
Customer follow-up is performed:
- By a trained individual
- According to specific and procedures that require documented contact with every new user
- Via telephone or in person

4.10 Web Exchange Services
The Web Exchange site complies with all state and federal laws, and has policies and procedures to protect users from fraud and other criminal activity, and to protect the privacy of user information.

Key Factors for Consideration
The Web exchange site user protection includes:
- Compliance with all state and federal contract laws
- Monitoring the site for inappropriate and outdated listings and removing those listings
- Monitoring device recalls and informing users
- Advertising and indexing the site with search engines
- Using metatags on listed items
- Providing the user with information regarding the privacy of data and the policy for listing devices on the exchange
- A published privacy policy that meets either the recommended guidelines of the W3C Platform for Privacy Preferences (P3P Initiative) or of Trust-e.org
- A procedure for customers to provide feedback or file complaints
- A procedure for resolving user complaints
5.0 Management

Rationale: Management provides leadership for securing financial support and requisite staffing to carry out the program's mission.

5.1 Management Expertise
The individuals in management have knowledge, skills and experience specific to their assigned roles.

Key Factors for Consideration
The individuals in management roles have:
- Knowledge that qualifies them to perform the specific management job
- Skills required to do the job properly
- Previous experience, not necessarily in the same role in an AT reuse program, but in a role that is relevant to the job

5.2 Mission Statement
The AT reuse program has a mission statement that is appropriate to the activities of the organization, and the stated mission drives program planning and activities.

Key Factors for Consideration
The AT organization (or the AT program within the organization) has a published mission statement that includes the following desired characteristics:
- Is brief
- Uses plain language
- Uses People First Language
- Is easily understood
- Is focused
- Expresses a commitment to the belief that AT reuse can enhance the lives of individuals with disabilities to achieve their goals
- Expresses a commitment to the belief that AT reuse can enhance the lives of the caregivers or direct support providers of people with disabilities

The annual goals and objectives are formulated for consistency with the stated mission, resources are allocated in this manner, and customers and their support systems are treated in a manner consistent with the stated mission.

5.3 Risk and Liability Management
The program has assessed its level of risk and liability and has implemented strategies to mitigate the identified risks and liabilities.

Key Factors for Consideration
The program recognizes potential risk and/or liability, and has:
- Assessed its exposure to risk and/or liability
- Implemented policies and procedures to mitigate risk and/or liability
- Identified appropriate types of insurance to address risk and/or liability
- Obtained appropriate levels of insurance coverage in all needed areas to address risk and/or liability

5.4 Recordkeeping
The program maintains its records within the provisions of its legal (or tax) status and all applicable laws.

Key Factors for Consideration
The program:
• Has written and implemented policies and procedures for the maintenance and retention of records for the periods of time required by law,
• Maintains records in compliance with its legal organizational structure as required by federal or state law (including tax-exempt status under the IRS, if applicable),
• Maintains customer records in compliance with the privacy provisions of all applicable laws, and
• Maintains its financial records in compliance with Generally Accepted Accounting Procedures (GAAP).

6.0 Human Resources
Rationale: Human Resources is responsible for compliance with laws and administration of policies pertaining to employees and employment.

6.1 Employment Practices
The program is compliant with federal, state and local laws in hiring employees and contracting additional services.

Key Factors for Consideration
The program has written policies and procedures that are used to ensure compliance with employment laws, including:
• The provisions of the Fair Labor Standards Act (FLSA) in the hiring and compensation of employees and the contracting of additional services
• Federal, state, and local anti-discrimination laws in hiring and contracting
• Accommodations for employees with disabilities that are consistent with the requirements of the Americans with Disabilities Act

6.2 Job Descriptions
The program has job descriptions that are focused and specific in their requirements.

Key Factors for Consideration
The program has written job descriptions that include:
• Purpose
• Duties and responsibilities
• Specific education and/or training
• Required work experience
• Specific credentials or licenses

6.3 Compensation Plan
The program has a compensation plan that is reasonable, fair and market-based.

Key Factors for Consideration
The program uses detailed job descriptions to devise its compensation plan, and:
• The program has analyzed the reasonableness of its compensation plan by comparing the salary structure in all positions to salaries paid for comparable positions in the local market.
• The program has compared the salary structure for all positions to the amount that would be required to hire a contractor to perform the same duties.
• The program has analyzed the fairness of its compensation plan by comparing the relative worth of positions within the organization.

6.4 Recruiting Employees and Contractors
The recruitment of employees and contractors is conducted according to written policies and procedures that facilitate the identification of candidates who meet specified requirements.
Key Factors for Consideration
The program has policies or procedures for recruitment of employees and/or contractors that specify:
- That all vacancies are posted internally
- When a position must be advertised externally
- The minimum number of candidates that must be interviewed

6.5 Hiring Employees and Contractors
The program has written policies and procedures that are consistently followed in the hiring of employees and/or contracting of staff.

Key Factors for Consideration
The program has written policies and procedures that are used:
- To check professional and personal references
- To verify the educational background claimed
- To confirm the work experience claimed
- To verify that the applicant holds the specific licenses or credentials required for the position, and that those licenses or credentials are active in the state of employment
- (If required by the program) to conduct criminal background checks
- To give preference in hiring to volunteers who apply (if they meet the specified requirements)

6.6 Worker Orientation
The program uses a structured orientation plan for new employees, contractors, volunteers and transfers.

Key Factors for Consideration
The program has an orientation packet that includes:
- Essential information about the organization
- Information about benefits
- Information about required training and the availability of formal training, on-the-job training or tuition reimbursement
- Required employment documents for signatures

The program has a job orientation process for new or transferring employees, contractors or volunteers that is formal, documented and provides the essential information to acquaint workers with new positions.

6.7 Training and Development
The program provides some job-related training for employees, contractors and volunteers.

Key Factors for Consideration
The program offers different types of job-related training opportunities to employees and/or contractors and volunteers that include:
- Formal training (on or off-site)
- On-the-job training
- Tuition reimbursement for education and/or training on the worker’s personal time

6.8 Worker Performance Evaluation
Personnel development is promoted through a program of consistently implemented, regularly scheduled, and documented performance evaluations.

Key Factors for Consideration
The program conducts regular, written performance evaluations in a timely, consistent manner for:

- Employees
- Contractors
- Volunteers

6.9 Resignations and Terminations
The program has written procedures that are consistently followed in handling the resignation or termination of an employee, contractor or volunteer.

Key Factors for Consideration
The program has written, consistently applied policies and procedures for handling resignations and terminations that include:

- Meeting with a manager who explains reason for termination, or who conducts an exit interview with resigning employee, contractor or volunteer
- Explanation of final compensation arrangements and continuation of benefits under COBRA (if applicable)
- Recovery of program property (e.g., keys, access cards, manuals, work product, tools)
- Immediate removal of access to the organization’s computers, data and records upon termination of employment

6.10 Contract Workers
The program has written policies and procedures that are consistently implemented for the contracting of services.

Key Factors for Consideration
The program has written policies and procedures that are applied consistently in the use of contracts that:

- Specify services to be rendered
- Specify fees to be paid for services
- Bind contractors to confidentiality and nondisclosure of information
- Require appropriate liability insurance
- Specify who retains legal ownership of work products

6.11 Volunteers
The program has implemented consistent policies and procedures for the recruitment and management of volunteers.

Key Factors for Consideration
The program has written policies and procedures for volunteers that:

- Specify practices for recruiting volunteers
- Define roles and responsibilities for volunteers
- Document systematic training plans to be used for volunteers
- Ensure that volunteer activities are managed by a program employee
- Afford preferences in hiring to qualified volunteers

7.0 Marketing
Rationale: Marketing is important to a program as a major means of generating business. The program cannot identify customers or obtain donations of equipment if the community does not know about the program. Marketing is also one avenue to begin relationships and collaborations with other businesses or groups to strengthen the program.

7.1 Market Analysis
The program has analyzed the market(s) it serves to determine the demographics of the population that may be in need of reused AT and has assessed the program’s ability to serve the population.

**Key Factors for Consideration**
The program has:
- Basic demographics
- Some reasonable information about the number of individuals in the market that may be in need of used assistive technology (that is, the number of uninsured or underinsured individuals)
- Addressed the geographic issues of reaching the entire service area

### 7.2 Marketing Plan
The reuse program has a comprehensive marketing plan.

**Key Factors for Consideration**
The program has a comprehensive marketing plan that includes activities designed:
- To obtain donations
- To inform the community about services and to reach potential customers
- To generate additional financial (or volunteer) support to sustain the program
- To show the economic and environmental benefits of the program

### 7.3 Optimizing Marketing Resources
The program optimizes the use of its marketing resources in its attempts to acquire and sustain community support.

**Key Factors for Consideration**
The program optimizes the use of its marketing resources:
- By identifying target audiences
- By using the most cost-effective means of reaching that audience
- By attempting to analyze return on investment for each marketing activity (e.g., computing total value of devices received in a donation event compared to the cost of the event)

### 7.4 People First Language
People First Language is used in all facets of the program.

**Key Factors for Consideration**
People First Language is used by the staff (through training), in program publications, and in all other facets of the program.

### 7.5 Geographical Service Area (Statewide Programs only)
The program has the capacity to serve all parts of the state.

**Key Factors for Consideration**
The program serves the entire state:
- Through a network of strategically located centers
- With a Web-based Exchange site
- Through collaboration with other organization(s)

### 7.6 Comprehensiveness (Statewide Programs Only)
The program serves clients of all ages and types of disabilities by providing reusable assistive technology of all types.

**Key Factors for Consideration**
The program serves clients of all ages and types of disabilities:
- By collaborating with organizations that focus on specific disabilities (e.g., United Cerebral Palsy)
- By collaborating with community institutions that reach specific age groups (e.g., schools and Senior Citizens centers)
- By collaborating with governmental agencies or community organizations whose clients may be uninsured or unable to afford assistive technology
- By collaborating with as many organizations as possible to identify potential users and to reclaim AT for reuse

7.7 Information Resources (Statewide Programs Only)
The program provides the customer with information about other providers of assistive technology and related services.

*Key Factors for Consideration*
The AT reuse program is prepared to provide customers additional information that may include:
- Appropriate types of medical personnel to assess AT needs
- Where to find AT professionals (evaluators and/or rehabilitation engineers)
- Other sources of used AT (including local providers and state or national exchange programs)
- Where to find qualified individuals to repair devices
- Where to find additional manufacturer information about the device

8.0 Accounting
*Rationale:* Accurate financial management and accounting are critical in every organization, and key activities are performed related to the legal status of the organization. The supporters, donor and contributors to a nonprofit AT re-use program expect the organization to demonstrate that it uses resources efficiently to meet the needs of prospective users.

8.1 Budgeting
Annual operating budgets are developed through a structured process involving key members of the management team.

*Key Factors for Consideration*
The program has implemented written procedures for preparing budgets that include:
- A thorough examination and development process
- All members of the operations management team
- Preparation of a contingency plan that specifies how to address budget cuts, shortfalls in income and/or unanticipated cost increases

8.2 Accounting Operations
The accounting operations are performed by qualified individuals who comply with governing law and written policies and procedures in managing the receipt and disbursement of funds, payroll and inventory.

*Key Factors for Consideration*
Accounting operations are performed by individuals with proper training and/or experience for their roles. Written policies and procedures ensure that accounting operations comply with existing laws and standard accounting practices:
- To manage payroll
- To disburse funds
- To manage accounts receivable and billing activities
- To track the value of devices assigned to customers and of inventory on hand

9.0 Supplier and Manufacturer Relationships

Rationale: Good working relationships with suppliers and manufacturers can strengthen a program. Collaboration clarifies the relationship, and removes the misconception that reuse programs pose a threat to suppliers and manufacturers. Instead they can work together to serve more people. Collaboration has the potential to benefit each component, by helping to sustain a reuse program and by increasing business for the suppliers and manufacturers.

9.1 Relationships with Suppliers & Manufacturers

The program collaborates with suppliers and manufacturers of the types of technology used in the program.

Key Factors for Consideration

The program:
- Collaborates with suppliers or manufacturers
- Works with manufacturers to certify its repair technicians (if applicable)
- Posts manufacturer certifications in an area visible to the customers of the reuse program

10.0 Emergency Preparedness

Rationale: Emergency preparedness offers a unique niche for reuse programs to fill. When an emergency or disaster happens, people are sometimes separated from their assistive technology. A reuse program with needed inventory and a plan in place can match AT to the person and get equipment to the people who need it in an orderly manner.

EMERGENCY MANAGEMENT

10.1 Continuity of Operations Plan

The program has a current and documented emergency preparedness plan that identifies the measures to be taken to remain in operation during and following an emergency or disaster.

Key Factors for Consideration

The program has a documented plan for dealing with an emergency or disaster that threatens its ability to operate as usual that includes:
- Policies that define when an emergency plan is triggered and when the program returns to normal operations, and who makes those decisions
- Identification of scenarios most likely to impact program operations and associated plans for operations in the event of those scenarios
- Identification of activities that will continue during an emergency or disaster and those that will be suspended
- Communication information for each worker who plans to be available for emergency response
- Specific assignments and succession planning for all key roles
- Plan for providing services from an alternate location, if necessary, including an inventory of tools, supplies and fixtures that will be needed
- Use of special vehicles to transport workers to the operations site or to deliver AT devices (if access via normal transportation is a potential issue)
- Backup copies of all databases, including customer records, inventory and accounting records, in an off-site and accessible location
• Established collaboration with other organizations, agencies or groups with Memoranda of Agreement in place
• Addressing the possible need for housing in another location for key staff
• Procedures for ‘sheltering in place’ if an unforeseen emergency prevents staff and/or clients from leaving the facility

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10.2 Disaster Recovery Assistance
The program has a plan in place to assist the community in recovery from an emergency or disaster situation by providing used AT to existing or new customers.

Key Factors for Consideration
The program has prepared to provide disaster recovery assistance:
• By having staff members and workers individually prepare plans for managing personal (and family) health and safety for the first 72 hours after the incident
• By establishing relationships with local emergency management agencies
• By having designated staff participate in emergency management training and FEMA certification for responders
• By securing Memoranda of Agreement to work with other agencies and entities in a specified manner; including, but not limited to vendors, therapists, storage facilities, van and truck rentals
• By documenting the AT reuse needs that can be anticipated in emergency situations
• With arrangements to access additional reusable AT from other programs, vendors or emergency caches
• By identifying the staff and skill sets that can be made available following a disaster
• By participating in community drills
• By establishing policies and procedures for the intake of AT requests and delivery timelines and means
• By establishing procedures for collecting and recording data regarding the emergency provision of AT
• By determining methods of communicating to other organizations and to customers about availability of devices or services

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Glossary

accessibility  physical facilities: ability of persons with disabilities to enter; web sites: ease of use for persons with disabilities

AT reuse activities  Assistive Technology activities include device exchange, reassignment/ redistribution, refurbishing, recycling and remanufacturing (not recommended)

continuity of operations  a plan for remaining functional during or following an emergency situation

contractor  one who provides specific services by agreement; not an employee

demographics  characteristics of individuals in a market (e.g., age, gender, income level)

device recall  A formal notice from the FDA that a device poses a hazard to the user and should be removed for repair or replacement

direct support system  person(s) who provide services or assistance to the customer

disaster recovery  measures taken to address the aftermath of a disaster

employee  a person on the organization’s payroll

exchange  reassignment from one user to another in which the program takes no ownership; a “classified ad” mode of reassignment

hiring  employment of an individual

intake  the policies and procedures used to handle a customer’s request for reused AT devices or associated services

liability  legal responsibility to make good in case of injury, damage or loss

matching  the process of identifying the device needed to
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>orientation</td>
<td>an overview or introduction to the organization and job</td>
</tr>
<tr>
<td>performance</td>
<td>an assessment of an individual's work based on redefined standards; a developmental tool or process</td>
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<tr>
<td>evaluation</td>
<td></td>
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<tr>
<td>privacy policy</td>
<td>on Web sites: the practices of the organization in handling user-provided information</td>
</tr>
<tr>
<td>reasonable and fair compensation plan</td>
<td>in this context, <em>reasonable</em> means comparable to similar position in the market or what it would cost to hire a contractor to perform the services; <em>fair</em> means that the compensation of comparable to positions of relative worth in the organization</td>
</tr>
<tr>
<td>recycling</td>
<td>end-of-life disposable in an environmentally sensitive manner, or breakdown of the device into components for use in repairs</td>
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<tr>
<td>recruitment</td>
<td>identification of candidates for positions</td>
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<tr>
<td>refurbish</td>
<td>to restore device to a condition consistent with manufacturer specifications</td>
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<tr>
<td>resignation</td>
<td>voluntary departure from an organization</td>
</tr>
<tr>
<td>risk</td>
<td>change of injury, damage or loss</td>
</tr>
<tr>
<td>sanitization</td>
<td>cleaning in a manner that removes potentially harmful microorganisms</td>
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<tr>
<td>sustainability</td>
<td>the ability of a program to continue operating</td>
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<tr>
<td>termination</td>
<td>discharge or involuntary departure from employment</td>
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<tr>
<td>trial on device</td>
<td>a period during which the customer is permitted to use the device proposed for assignment</td>
</tr>
<tr>
<td>volunteer</td>
<td>one who provides services without charge</td>
</tr>
<tr>
<td>W3C</td>
<td>Worldwide Web Consortium, an international organization dedicated to full development of the Web</td>
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</table>