External Evaluation of Monitors with Disabilities' Experience with the Transition to Virtual Monitoring for Independent Monitoring for Quality (IM4Q) in Pennsylvania
2022 Report

Submitted to: The Institute on Disabilities, Temple University
Pennsylvania's University Center for Excellence in Developmental Disabilities
Education, Research and Service

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Introduction

Pennsylvania is a national leader in measuring quality services and supports for people with disabilities. The Independent Monitoring for Quality (IM4Q), funded by the Office of Developmental Programs and facilitated by the Institute on Disabilities at Temple University, in partnership with program Monitors across the state, builds on the National Core Indicators (NCI) process. The IM4Q measures satisfaction, dignity, respect, rights, emergency preparation, employment, relationships, inclusions, choice, and control from the perspective of Pennsylvanians with disabilities who use services and supports.

The IM4Q includes people with disabilities as independent Monitors to provide peer-to-peer interviewing and data collection. Monitors with disabilities, like Monitors without disabilities, are offered formal training and support from the NCI and IM4Q Technical Assistance teams, as well as from Program Coordinators across the state. Throughout the COVID-19 pandemic, from 2020-2022, IM4Q data collection transitioned to virtual interviews to ensure the health and safety of both Monitors and Interviewees. Monitors were offered additional training and technical support to conduct interviews online using the Zoom platform.

In line with their commitment to ensuring that people with disabilities succeed as IM4Q interviewers, the Institute on Disabilities sought to assess the support and experiences of Monitors with disabilities in the virtual interviewing environment. Specifically, the aim was to ensure that Monitors with disabilities received the training and technical support they needed to arrange, conduct, and effectively collect data about the experiences of people with disabilities using services and supports across Pennsylvania.

About the Evaluation

The National Leadership Consortium on Developmental Disabilities was funded by the Institute on Disabilities at Temple University to conduct an external evaluation to understand the transition from in-person to virtual IM4Q monitoring that will inform future training and accessibility for Monitors with disabilities. The mixed methods evaluation took place from June 2022 through August 2022. It consisted of two phases of data collection: 1) A survey of all Monitors and Program Coordinators, and 2) Interviews with 12 Monitors with disabilities.

Phase 1: Survey | A web-based survey was developed by the research team of the National Leadership Consortium in consultation with IM4Q Technical Advisors at Temple University in June 2022. An initial survey draft was sent to select Program Coordinators for review, and minor changes were made as a result of their input. The final survey consisted of six demographic questions posed to all participants and a screening question that asked participants to identify as either: an IM4Q Monitor with a disability, an IM4Q Monitor who is a family member of someone with a disability, an IM4Q Monitor who is not a person with a disability or a family member of a person with a disability, or an IM4Q Program Coordinator. Participants were routed to one of two survey tracks depending on whether they identified as a Monitor or a Program Coordinator with an additional 19 to 24 questions. Survey questions related to three core focus areas: 1) Training and preparation, 2) Ongoing support, and 3) Overall experiences and

recommendations. The survey contained multiple choice and short answer questions and was open to respondents from July 5th through August 6th, 2022. The survey link was sent to Program Coordinators at all Pennsylvania IM4Q programs[1]. Program Coordinators were asked to distribute the link to the Monitors in their programs.

Phase 2: Interviews | The focus of this evaluation was to investigate the transition process from in-person to virtual interviewing for Monitors with disabilities; hence additional data was collected through interviews with 12 Monitors with disabilities. Interview participants were recruited via the survey, which contained a request for permission to contact and an email address where follow-up information about the interview and a link to schedule an interview could be emailed to willing participants. Program Coordinators also assisted with recruiting interview participants by asking Monitors with disabilities to reach out to the research team via email or providing Monitors with the weblink to schedule an interview directly. Interviews were conducted from July 12th through August 12th, 2022. Interview questions reflected the same core focus areas as the survey and were open-ended to offer the opportunity for in-depth responses.

Information from both phases of data collection is integrated throughout this report to offer a well-rounded overview of perspectives from Monitors and Program Coordinators. Each section of the report highlights the perspectives of Monitors with disabilities to emphasize their experiences and recommendations.

Participants

Phase 1: Survey Participants | For this study, 118 IM4Q Monitors and Program Coordinators responded to the survey. The majority of the responses were from Monitors (80.5%), with the remaining responses (19.5%) from Program Coordinators. Among the Monitors, those who were not people with disabilities or family members were most represented (29.6% of all participants), followed by those who identified as family members of someone with a disability (28.8 %). Monitors with disabilities represented 22.0% of the participants.

Participants were predominantly white (92.4%) and female (89.0%). The majority of participants were between 25-34 years old (13.56%), 35-54 years old (17.0%), and more than 65 years old (17.0%); 30% chose not to report their age. Nearly half of the participants (48.3%) had four years or less experience with the IM4Q program. Almost one-quarter (23.1%) of the Monitors had been an IM4Q Monitor for only one year, while 3% had done it for more than 20 years. Of the Program Coordinators who participated, three-quarters (72.7%) had joined the IM4Q program over the previous ten years, while 10% had been a Coordinator for 20 years. Figure One shows the distribution of Monitor and Program Coordinator experience.

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[1] Vision for Equality, MHA of Franklin/Fulton County, The Arc of Lancaster/Lebanon, Parent to Parent Connections, CIL Opportunities, Advocacy Alliance, The Main Link, Vision for Equality, Voice and Vision, Inc., IM4Q Program of Chester County, Delaware County Advocacy and Resource Organization, IM4Q Program of Montgomery County, Vision for Equality, Chatham University IM4Q Program, The Arc of Indiana, Community Voices IM4Q, Crawford County Consumer Satisfaction Team, MHA of Fayette County, Lawrence County Community Action Partnership, MHA of Southwestern PA, Grapevine Center, Always on Our Own

Figure 1

Monitor and Program Coordinator Years in the IM4Q Program

How many years have you been an IM4Q monitor or program coordinator? (N=114)

Legend: Monitors, Program Coordinator. X-axis: Years in the IM4Q Program (<1 through 20).
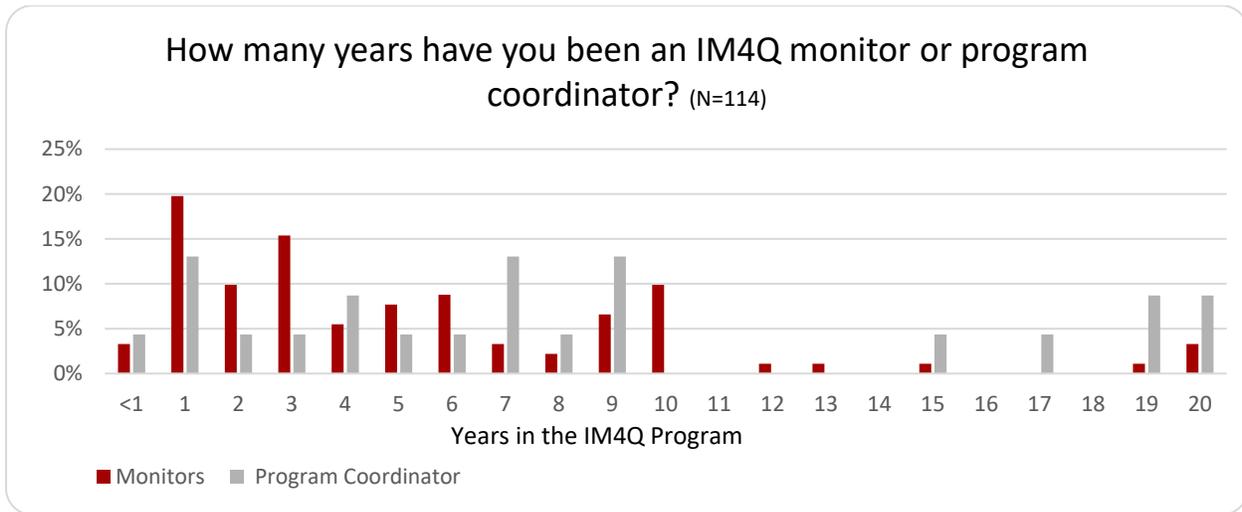
Participants worked with the 20 IM4Q programs in Pennsylvania. The program "Advocacy Alliance" had a prominent representation in the survey, with 19 participants representing 16.1% of responses.

Phase 2: Interview Participants | Twelve Monitors with disabilities participated in the interviews. All interview participants identified as White, and two-thirds as female. Most Monitors interviewed were between 45 and 54 years old, representing 33.3% of the interview participants. While most Monitors identified as having more than one disability, half self-identified as having intellectual or cognitive disabilities. Two-fifths of the IM4Q programs in Pennsylvania were represented in the interviews, with Monitors from 8 out of the 20 IM4Q programs participating. One-quarter of the interviewees have been Monitors for four years, with one participant having more than 13 years of experience in the IM4Q program.

Training

Training: All Participants

All Monitors participated in additional training to assist in transitioning from in-person to virtual interviewing. Monitors were asked about the amount of training they received, what they were trained in, and how confident they felt after training. Overall responses from IM4Q Monitors indicated that the two to five hours of training offered was enough to instill confidence in most Monitors to conduct virtual interviews. Most of the training was facilitated via online modules, but participants reported that training support was often tailored to suit the individual Monitor. One Program Coordinator shared*, "It was all based on the individual's specific needs. I provided several options for completing the training. With some individuals, we went over the trainings together after each chapter; some also took them at home with support. I provided continuous support throughout the process."* Training styles varied, with training reported as

taking place in the home or in an office, individually, with family members, with at-home support personnel, with Program Coordinators, or with a group (in-person or online). Program Coordinators often reported offering additional support, such as extra training time and helping Monitors log back into the training program to continue after stopping.
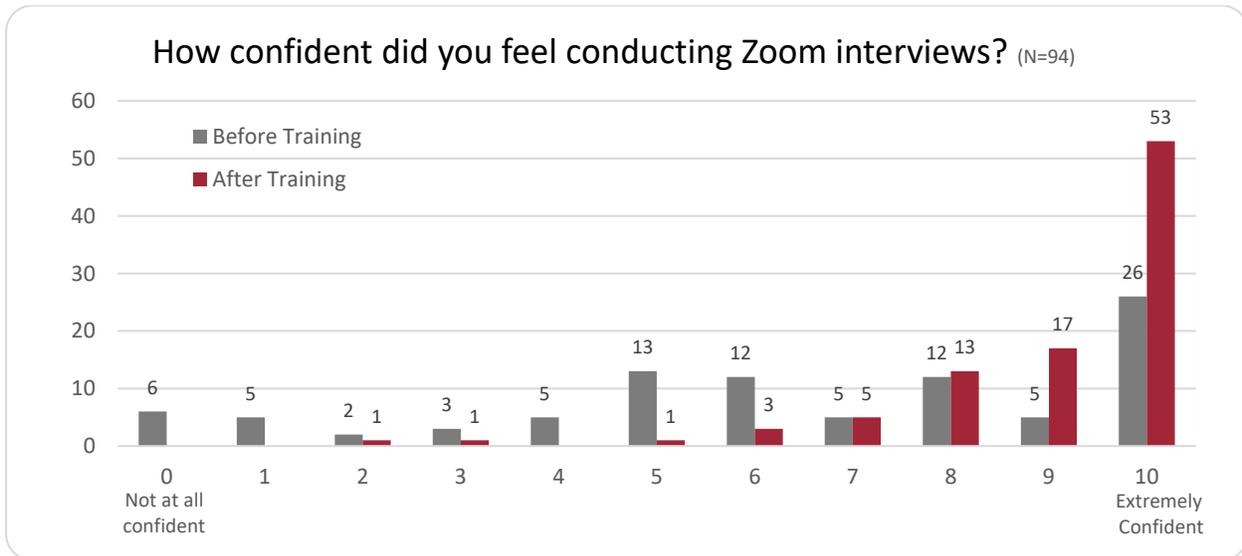
Most of the participants (65.1%) received between two to five hours of training to transition from in-person to virtual interviewing, with one-third of those participants receiving 2-3 hours of training, one-third receiving 3-4 hours of training, and one-third receiving 4-5 hours of training. Six participants (7.2%) said they received more than 10 hours of training, while five (6%) reported receiving less than one hour. The majority of participants (83%) selected "Agree (Completely trained)" when asked if the amount of training they received overall (including NCI training) to transition from in-person to virtual interviewing was appropriate. About one-tenth of participants (11.7%) selected "Somewhat Agree (I needed a little more training)," while 1.1% (1 person) said they "Somewhat Disagree (I needed a lot more training)," and 4.3% (4 people) said they "Disagree (not at all trained)." Almost all participants (93.5%) agreed that they were trained in a way that was accessible to their communication, learning, and support needs.

Many Monitors had positive remarks about the training and the personnel who helped train them. Training was described as *excellent, enjoyable, helpful, informative, thorough, and appropriate*. One respondent noted that the visual samples used were very helpful; another said the material was more thoroughly explained during one-on-one training. Program Coordinators and Supervisors were described as *professional, patient, supportive, attentive, responsive, accessible, and knowledgeable*. One Monitor without disabilities said, *"My supervisor did an excellent job training our staff for virtual interviewing. She was always available to answer questions and always sent us out step-by-step sheets explaining what we had to do and how to do it."* Only two comments from Monitors were more critical of the training process, saying it was hard doing it by Zoom, *"very stressful"*, and *"hectic."*

Positive experiences with training were reflected in Monitors' 39.1% growth in confidence scores related to conducting virtual interviews before and after the training (see Figure 2). Participants were asked, *"How confident did you feel conducting Zoom interviews before receiving training for virtual interviewing?"* and *"How confident did you feel conducting Zoom interviews after receiving training for virtual interviewing?"* and given the opportunity to rate their confidence on a scale from *0 (Not at All Confident)* to *10 (Extremely Confident)*. The average confidence score before training was 6.5 out of 10, and the average score after was 9.0 out of 10, reflecting a 2.5-point or 39.1% increase in confidence.

Figure 2

Confidence Conducting Zoom Interviews

How confident did you feel conducting Zoom interviews? (N=94)

Before Training

After Training

	0 Not at all confident	1	2	3	4	5	6	7	8	9	10 Extremely Confident
Before Training	6	5	2	3	5	13	12	5	12	5	26
After Training			1	1		1	3	5	13	17	53

Training: Monitors with Disabilities

Survey results showed that Monitors with disabilities primarily agreed that they were trained on how to use Zoom to conduct virtual interviews. Yet, interview results showed that a few Monitors said they would have liked more training about the Zoom platform. Many Monitors with disabilities also shared that they would have benefitted from ongoing access to the online training materials after completing the training. These Monitors expressed frustration that they could not go back into the training to review or check the information related to the incorrect answers they got on the training quizzes. Some Monitors also shared that they had no reference materials and felt that having reference guides would have been useful. In contrast, others expressed appreciation for the reference materials that their Program Coordinators provided. Most Monitors reported in the interviews that they benefited from one-on-one training and thought it could help other Monitors to receive additional one-on-one training. Additionally, peer support from a more experienced Monitor while training was suggested.

Training Recommendations

Most Monitors felt comfortable using Zoom, with 89.0% agreeing that they were completely trained on how to use Zoom to conduct virtual interviews. Only 7.4% of Monitors responded that they needed a little more training. However, fewer Monitors agreed that they were completely trained about how to support the people being interviewed to use Zoom (73.4%), with 16% of Monitors needing a little more training, 4.3% requiring a lot more training, and 6.4% saying they were not trained at all to assist others with Zoom (see Figure 3). Similarly, a portion of Monitors lacked training in creating rapport with people they interviewed virtually on Zoom. While almost 79.8% indicated they were completely trained in building rapport, 13.8% shared that they needed a little more training, and 6.4% felt they needed a lot more training or were not trained at all. These lower scores were also seen in responses from Program

Coordinators; 78.3% responded that they completely trained Monitors on how to support the person being interviewed to use Zoom, and 69.6% shared that they completely trained Monitors about how to create a rapport with the interviewee on a virtual platform. These results point to two areas of training that could be strengthened: how to support people being interviewed to use Zoom and how to create a rapport with people being interviewed virtually.

Figure 3

Training Provided for Transition to Virtual Monitoring
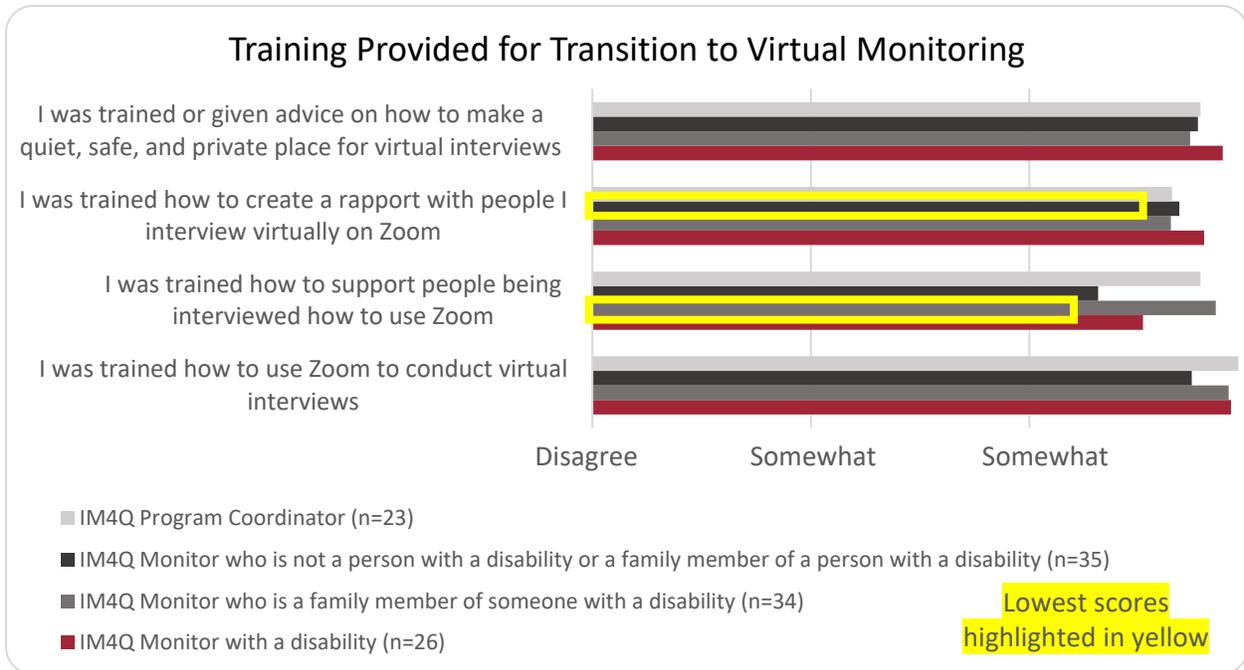
Survey results showed that recommendations provided by Monitors without disabilities also included inviting Monitors to attend statewide trainings to benefit from the knowledge shared at those events and offering opportunities for new Monitors to shadow experienced Monitors during training.

On the survey, Program Coordinators were asked to describe what they did differently for training Monitors with disabilities. Their additional training methods included:

- Recording trainings on Zoom to be used throughout the agency
- Providing opportunities to shadow other Monitors
- Training on the specific tool questions and answers
- Providing "cheat sheets" on how to log in and additional information
- Training on how to develop a rapport
- Training in different formats (group and individual sessions) as needed
- Using examples and different scenarios to walk through troubleshooting
- Training the Monitor's support person as well
- Meeting monthly to discuss challenges and successes

These methods were shown to be effective for Monitors in some programs and could be shared across the state and applied universally to future trainings.

Support

Support: All Participants

Participants' perspectives regarding the support provided to conduct virtual interviews were collected in both phases of the evaluation process. Monitors who responded to the survey were asked about the appropriateness of the amount of support offered by Program Coordinators and other IM4Q staff. Program Coordinators who responded to the online survey also provided information regarding additional supports to accommodate Monitors with disabilities conducting virtual interviews. In phase two, Monitors with disabilities who were interviewed provided information regarding the positive aspects of the support provided, challenges they experienced, and their recommendations.

The 92 Monitors who responded to the survey reported the level of support they experienced during the transition to virtual interviews (see Figure 4). Overall, Monitors agreed that they were supported while conducting virtual interviews. Most of the Monitors (80.4%) stated they were completely supported by the Program Coordinator or other IM4Q staff when experiencing issues with virtual interviewing. However, five Monitors (5.4%) indicated they needed more support, while one (1.1%) did not feel at all supported. The remaining 12 Monitors (13%) reported not having needed additional support.

Figure 4

Rating of Support Received by Monitors

I have received an appropriate amount of support regarding issues with virtual interviewing from the program coordinator or other IM4Q staff (N=92)

Category	Percentage
Completely supported	80.4%
I needed a little more support	5.4%
I needed a lot more support	
Not at all supported	1.10%
N/A I have not experienced issues or needed...	13.0%
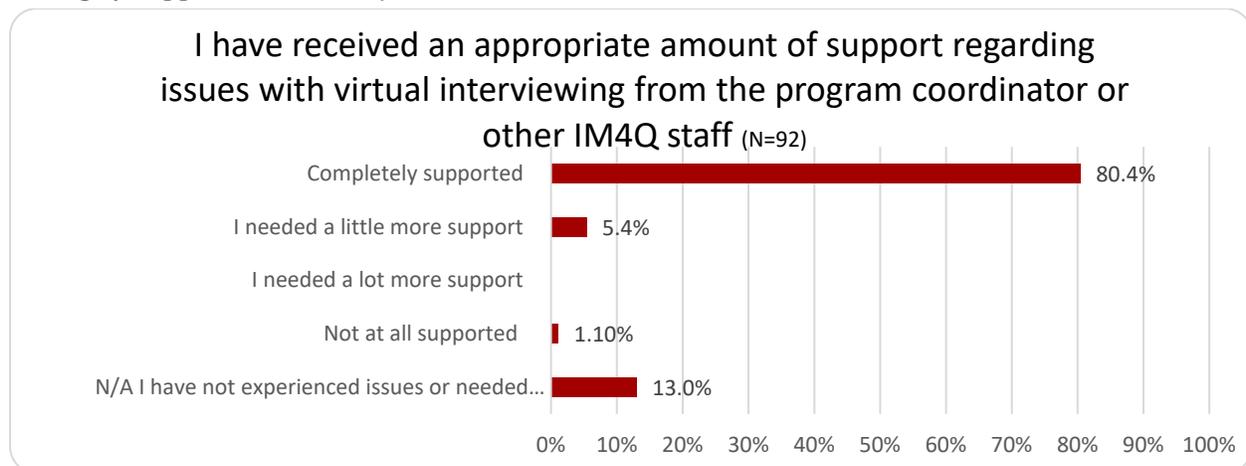
Figure Five shows the level of support provided for each category of Monitors. Responses from Monitors who identified as family members of a person with a disability and Monitors with disabilities were aligned, showing a similar distribution of responses. However, more Monitors who are family members of a person with disabilities felt completely supported (29). One Monitor who was a family member of a person with a disability indicated needing more support; three said they did not require support at all. Finally, 24 Monitors without

disabilities and who were not family members of a person with disabilities indicated they were completely supported, while three claimed to have needed more support, and one was not supported at all. The six remaining Monitors of that group indicated they did not request support.

Figure 5

Ongoing Support Provided to Monitors

I have received an appropriate amount of support regarding issues with virtual interviewing from the program coordinator or other IM4Q staff (N=93)

- Agree (completely supported): 24 / 29 / 21
- Somewhat Agree (I needed a little more support): 3 / 1 / 1
- Somewhat Disagree (I needed a lot more…):
- Disagree (not at all supported): 1
- N/A I have not experienced issues or needed…: 6 / 3 / 3

■ IM4Q Monitor who is not a person with a disability or a family member of a person with a disability (n=34)
■ IM4Q Monitor who is a family member of someone with a disability (n=33)
■ IM4Q Monitor with a disability (n=26)

Support: Monitors with Disabilities

In general, all Monitors with disabilities that needed ongoing support with virtual interviewing were supported by the Program Coordinators or other staff members. Of the 25 Monitors with disabilities who responded to the survey, 22 indicated that they were supported during the transition to virtual interviewing, while the other three said they did not need support. As Figure Five shows, 21 Monitors with disabilities indicated they were completely supported, while just one stated they needed more support. No Monitors with disabilities felt they were not supported or needed much more support than they received.

Monitors with disabilities generally provided positive feedback regarding the support received to conduct virtual interviews. Specifically, eight out of 12 interviewees directly reflected on the positive aspects of support, such as quality and availability. For instance, regarding the quality of support, one of the Monitors with disabilities said: *"Good support; '8 or 9 out of 10' because it was there if I needed it."* Other participants with disabilities also talked about the availability of support; one said: *"People were there helping with the interview."* Other

Monitors shared that they had access to ongoing technical support; one said: "*We had numbers to call if we needed technical support.*"

Many Monitors reported needing to create or find a new environment to conduct interviews virtually, with more Monitors with disabilities (21%) needing to adapt their environment than other groups of Monitors (see Figure 6). Program Coordinators and support personnel helped set up the required environments before the virtual interviews began.

Figure 6
Monitors who needed to create/find a new environment to conduct interviews virtually

Monitors with a Disability
21%

Monitors with a Family Member with a Disability
16%
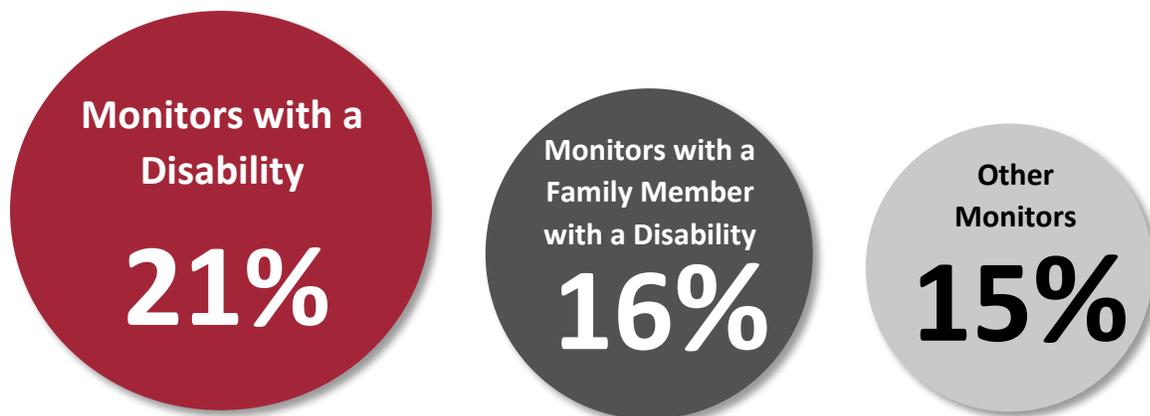
Other Monitors
15%

About one-third (34.8%) of the Program Coordinators responding to the survey described supporting Monitors with disabilities differently during the transition to virtual interviewing than what was offered for in-person interviewing. Their additional support methods included:

- Providing extra equipment, such as headphones and iPads/tablets
- Providing guidance on environmental adaptations for ideal virtual interviews
- Providing office space for virtual interviews
- Providing coaching to Monitors without disabilities on how to support Monitors with disabilities
- Setting up Zoom on iPads and tablets
- Helping with troubleshooting (sending links to connect to Zoom, checking webcam, checking audio)
- Participating in interviews in case support was needed during the interviews
- Providing electronic versions of surveys
- Increasing check-ins with Monitors with disabilities

"We offered a private space in our office if an individual needed it as well as having [staff] available to set up zoom and equipment. We also offered iPads if needed."

– Program Coordinator

Support Recommendations

Many Monitors reported needing additional technology to be able to conduct interviews virtually (see Figure 7). Twenty-six percent of Monitors who were a family member with a disability, 20% of Monitors with a disability, and 10% of other Monitors needed equipment such as tablets and webcams from their IM4Q programs. In addition to physical support related to technology, Monitors also benefitted from ongoing access to support personnel from their centers. Many Monitors said they were able to call their supervisors or Coordinators anytime they had a question.

Figure 7

Monitors who needed new technology to conduct interviews virtually

Other Monitors
10%

Monitors with a Family Member with a Disability
26%

Monitors with a Disability
20%

"Sometimes circumstances present themselves that we cannot always feel prepared for, but you always learn from them and improve for the next interview. It helps having knowledgeable peers to discuss scenarios with and a supervisor who is very supportive and encouraging." – Monitor without a disability

"[The training] was very helpful, and there was continued support if I needed it. The Program Coordinator did a great job of making me feel completely comfortable with doing surveys."
– Monitor without a disability

During the interviews, two Monitors with disabilities offered specific recommendations to improve ongoing support. One of them reflected on the possible benefits of having in-person support to assist while conducting the interview: *"Having someone next to me if I made a mistake and jump in when I needed help [was helpful]."* Another Monitor talked specifically about providing support regarding the clarity of the interview questionnaire. They suggested getting assistance from family members, staff, or support person if having difficulties understanding questions or conveying responses: *"[Having] a family member get on screen or if they were having difficulty understanding whoever we were interviewing that day to be able to understand them and tell us what they meant [was helpful]."*

Overall Transition to Virtual Monitoring

To assess the experience of transitioning to virtual monitoring, Monitors and Program Coordinators were asked to rate the overall interview experience and quality of interviews using the virtual interview approach. Monitors with disabilities who participated in the interviews were also asked to reflect on the transition to virtual monitoring.

Transition to Virtual Monitoring

   Monitors and Program Coordinators generally rated the transition to virtual monitoring positively. On average, Monitors with disabilities (8.9 out of 10), Monitors who were family members (8.5 out of 10), and Monitors without disabilities (8.6 out of 10) rated the transition more positively than Program Coordinators (7.74 out of 10). Figure Eight shows how each participating group rated their overall transition experience on a scale from 0 to 10, with high and low percentages displayed.

Figure 8
Overall Experience with Transition to Virtual Monitoring
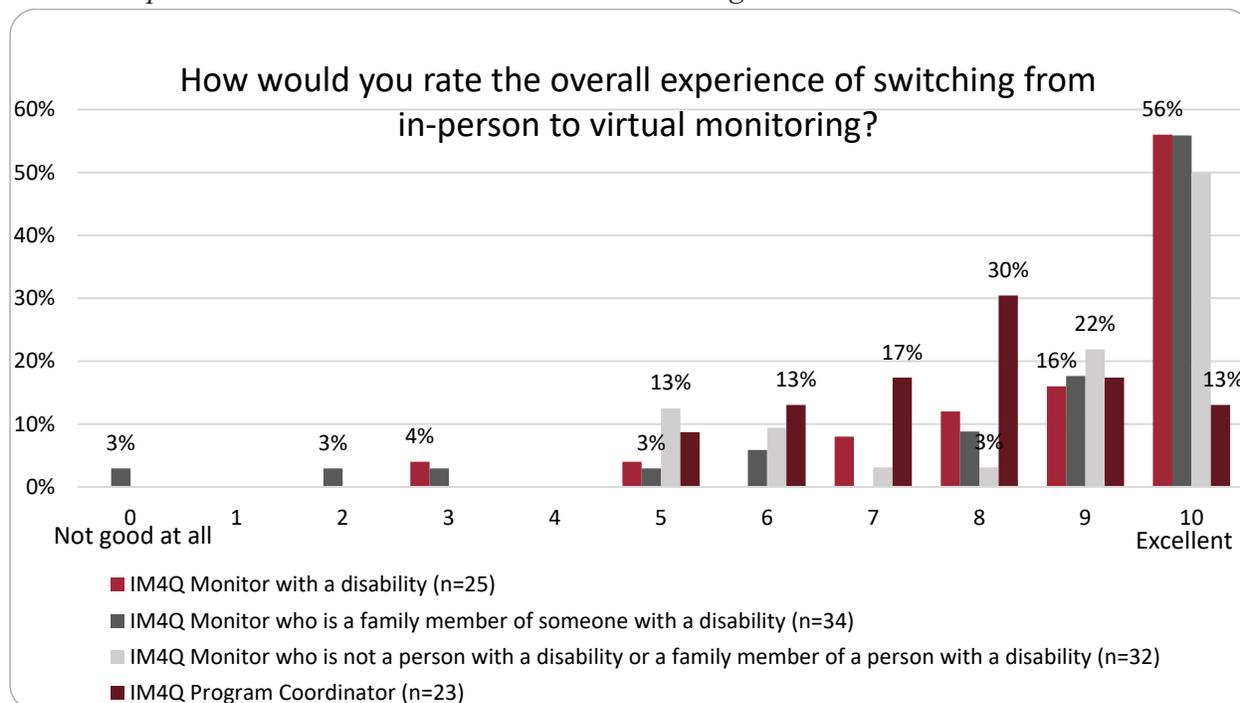
   Results from the interviews may shed light on the differences between Monitors with disabilities and Program Coordinators. For example, several Monitors with disabilities shared that they preferred the virtual interviews because they were more accessible and less time-consuming than in-person interviews, which involved arranging transportation and potentially inaccessible interview spaces. These benefits and challenges are described further in the section below.

   Many Monitors with disabilities also shared that their experiences with the transition to virtual interviews depended on their familiarity and comfort with technology (particularly the Zoom platform) and the support they received to arrange, conduct, and submit results from the interviews. People who were more familiar with Zoom, or had the support they needed, tended to describe the transition as smoother. However, when Monitors with disabilities felt they did not have the support they needed to access and use Zoom or troubleshoot technical issues during the interview, they described the transition as less successful. These results will also be discussed further in the *Benefits and Challenges of Virtual Interviewing* section of this report.

Quality of Interviews Before and After Switching to Virtual Interviews

When asked to consider the quality of virtual interviews, most Monitors felt that they were able to get people as involved and gather as much information during virtual interviews as they did during in-person interviews. Figures Nine and Ten show how Monitors rated the involvement and information collected during the virtual interviews. In general, there were no substantial differences between the types of Monitors; the majority of all Monitor groups indicated that they could get people as involved and gain as much information during the virtual interviews.

Figure 9

Monitor Success in Getting People Involved During Virtual Interviews (as Compared to In-person interviews) (n=88)

- ■ Less than Before
- ■ About the Same as Before
- ■ More than Before

Although most people shared that it was as easy or easier to get people involved in the virtual interviews as the in-person interviews, several Monitors with disabilities identified challenges in engaging people during the follow-up interviews. For example, some Monitors with disabilities shared that it was harder to build rapport and trust with people virtually, so people were more hesitant to offer personal information. They also shared concerns that people with less access to technology or data availability would be less likely to get involved in the interviews. Finally, a few people shared that some interviewees did not show up at the scheduled time, although they also said that was an issue with in-person interviews. These results are discussed further in the next section.

Results from interviews of Monitors with disabilities show mixed reviews as to whether the quality or amount of information provided was better or worse during the virtual interviews. Some Monitors identified issues with gathering information from interviewees. They shared interviewees could be hard to understand (and did not have a translator or someone supporting them with communication), difficult to engage with, or talked over by the person supporting them during the interview. However, some Monitors noted that these were also challenges they faced in the in-person interviews.

Figure 10

Monitor Success in Gaining Information from Interviewees during Virtual Interviews Compared to In-person Interviews (n=86)

- ■ Less than Before
- ■ About the Same as Before
- ■ More than Before
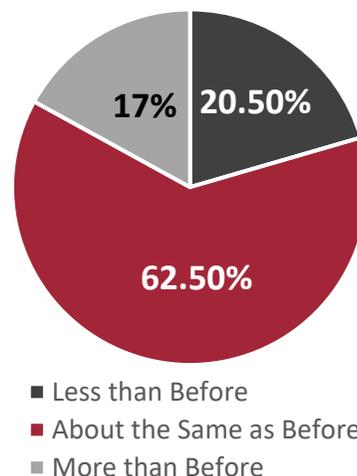
Overall Interview Experience

      Although Monitors offered mixed reviews as to whether the virtual interviews were as successful as the in-person interviews, they generally rated the virtual monitoring experience as good or excellent. Figure 11 shows how each Monitor group rated the overall virtual interviewing experience. More than 75% of Monitors with disabilities and 80% of Monitors who were family members with disabilities rated the overall experience at an eight or above (on a scale of one to ten), while 61% of Monitors who did not have disabilities and were not family members did.

Figure 11

Rating of Overall Interview Experience
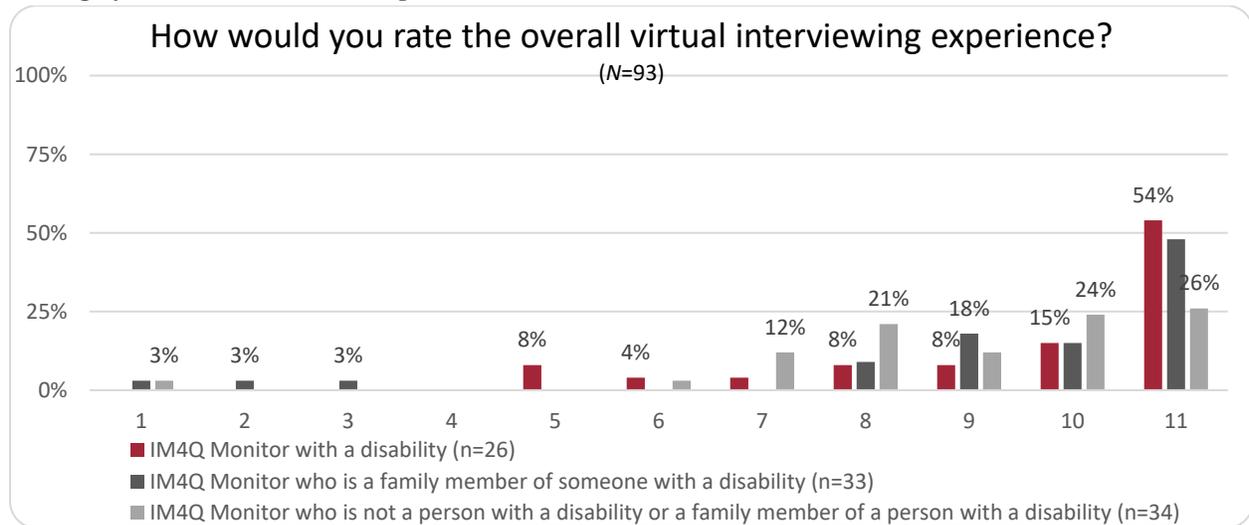
"It's a toss-up between in-person and virtual; virtual went better than I had expected."

— Monitor with a disability

"For many, it was learning a new skill and becoming more versed with virtual opportunities. We saw how the last couple of cycles have affected our Monitors who also became more isolated. We feel having the contact through their work was very important to them. Face to face through Zoom is also more personal than the phone."   *— Program Coordinator*

Benefits and Challenges of Virtual Monitoring

      Survey and interview participants were asked about the benefits and challenges they faced with virtual monitoring. Participants also offered recommendations to improve the process. Themes shared by Monitors and Program Coordinators were nearly identical; however, the frequency of pros and cons sometimes varied, with each group emphasizing different elements that tended to match their roles. For example, Monitors expressed the relief pertaining to transportation in terms of saving money on gas, stress finding parking, and wear and tear on vehicles allowed by virtual interviewing, while Program Coordinators also mentioned fewer transportation concerns as a benefit but focused more on the ease of scheduling and conducting more interviews due to less transportation. Less travel and convenience topped the list of benefits

shared by participants, while technical difficulties and lack of access to assess the interviewees' physical surroundings were the top challenges.

Benefits of Virtual **Monitoring**

Benefits: Monitors

All groups of IM4Q Monitors, those with and without disabilities, named similar benefits of conducting interviews virtually when asked in the survey and interviews, including health safety, increased comfort, and the ability to schedule more interviews. However, Monitors with disabilities emphasized the benefits of the convenience, accessibility, and flexibility of virtual interviewing more. In contrast, other Monitors named the lack of transportation worries (i.e., less wear and tear on vehicles, no travel time, saving money on gas, no stress to find parking, no buses near location) as a top benefit of conducting interviews virtually. Many IM4Q Monitors with disabilities valued the convenience of virtual interviewing, liking that they were able to do the interviews from home without having to go out in bad weather, worry about finding someone's house, or worry about how accessible it would be for them once they got there. Other benefits of virtual interviewing included: easier scheduling, increased safety, more engaged interviewees, and opportunities for Monitors to keep working throughout the pandemic (see Table 1).

Table 1
Benefits of Virtual Monitoring

More Convenient	Able to do them from home or the office
	Do not have to try and find someone's house
	Do not have to go out in bad weather
	Accessibility to houses is not an issue
	Easier to complete
Require Less Travel	Saves time
	Eases difficulty of travel
Easier to Schedule	More flexible scheduling
	Interviews take less time/travel (allow Monitors to do more)
Safer	Avoids exposure to COVID-19
	Interviews conducted in a safe environment
More Engaging	People are more focused
	Fewer interruptions
Enable Monitors to Keep Working	Allowed interviews to keep going during COVID-19

"It is difficult to travel to interviews. With [COVID-19] it kept me safe not being around other individuals."   *– Monitor with a disability*

"I had their attention, and there seemed to be less interruptions." – Monitor without a disability

"I did NOT have to worry about accessibility of the houses." – Monitor with a disability

"It's better for Monitors because we don't have to go to a person's home. Sometimes strangers don't want people going into their houses." – Monitor with a disability

"I can make more calls in a limited time than in-person when traveling is involved."
–Monitor without a disability

Benefits: Program Coordinators

Program Coordinators also named less travel as the top benefit of virtual interviews. They noted that having to travel less saved time, saved money for the program, and kept more interviews scheduled during bad weather. Less travel was also one of the reasons Program Coordinators reported that they were able to schedule more interviews when they were done virtually. Flexibility in schedules and being able to meet with people in different locations at the same time also reportedly contributed to being able to schedule more interviews virtually.

Program Coordinators also noted that virtual interviewing was more comfortable and convenient. The people with disabilities being interviewed did not have to worry about Monitors seeing into their homes or cleaning before visits; interviewees were more willing to meet with Monitors online. It was also more convenient for people living in family settings and easier for parents who worked during the day to participate in virtual interviews. The Monitors wasted less time on "no shows" and did not have to worry about accessibility, which allowed more people with disabilities to participate as Monitors when they did not face transportation and accessibility issues.

"Virtual interviewing allowed Monitors that needed accessibility to be able to access any environment an interview was being conducted. It saved travel time and therefore allowed for more flexibility for interview timing — two interviews could be conducted relatively close together if needed. There was no loss of interviewing ability due to bad weather, [which was] especially helpful during winter months." – Program Coordinator

"The Monitors could stay safe in their own homes and still participate in the IM4Q survey process, keeping them involved with this and still being able to make some money as well."
– Program Coordinator

"Many of the Monitors and especially those with disabilities used this [COVID-19] time as a time to learn more about using a computer and virtual ways to connect to others. It was a great learning experience." – Program Coordinator

The survey results showed that Program Coordinators also noted that many people could participate in virtual interviews because they used familiar technology. They also recognized that many interviewees had been secluded due to the pandemic, even from their support coordinators; virtual interviews allowed people to share their experiences.

Challenges of Virtual Monitoring

Challenges: Monitors

While Monitors shared many benefits of virtual interviewing, the virtual monitoring experience was not flawless. Participants reported about as many cons as pros related to virtual monitoring; there were no substantial differences between Monitors with disabilities and other Monitors in the types or scope of challenges experienced. Technical difficulties and inability to assess the physical environment and support staff of the person being interviewed were the top challenges reported about virtual interviewing, followed closely by the lack of engagement and difficulty building rapport with the interviewee.

Most comments in the survey and interviews related to challenges indicated some sort of technical issues, such as issues with Zoom (e.g., the interviewee not having access to Zoom, not having the correct link, not being able to log on, not knowing how to use the platform and its features, discomfort with Zoom, and difficulty having them download the app), internet issues (e.g., not able to connect, poor audio, getting cut off due to a poor connection, the screen freezing due to a poor connection), and not having the technology needed to participate (e.g., no internet access or no device with the ability to connect via the internet). The comments were filled with frustration that Monitors struggled to help with these issues on the interviewee's end.

Not being physically present during the interview also posed problems for participants. Some of the questions during the IM4Q interviews required the interviewer to report data about the interviewee's environment and staff; this was difficult to do via a Zoom call, and many Monitors mentioned the issue. Monitors also shared that because they could not see off-screen, they were not always sure who was in the room with the interviewee, and privacy could not be ensured. One Monitor with disabilities explained in an interview how she thought someone was off to the side and influencing the interviewee's answers during one interview.

Virtual interviews were also reported to be less personal than in-person interviews, leading to less relationship building and trust and more no-shows. Some Monitors explained how engaging people on the other end of a Zoom call was harder, making the interviewee not as talkative or interactive as they would have been in person. Because the Zoom calls were less social, Monitors also found it more difficult to build a rapport with the interviewees. Further, because it was easier not to meet for a Zoom call than to ignore Monitors knocking at your door, some Monitors dealt with more no-shows than in-person interviews. These challenges are outlined in Table 2 below.

Table 2

Challenges with Virtual Monitoring

Technical Issues	Connection difficulties
	Poor audio connection
	No computer or tablet
	Unfamiliar with Zoom
	Not familiar with the Zoom chat feature
	No internet access
No Access to Physical Surroundings	Cannot properly assess environment and staff
Less Engagement	Interviewees were not as talkative or interactive
	Harder to build rapport
No Privacy	Other people around may influence the interview
No Shows	Easier to forget or not show up to a virtual interview

"When I started it was really difficult for me because I like to be face-to-face with people. So, for me personally, it was a challenge because I feed off of other people's experiences."
– Monitor without a disability

"A couple times, only when I'm home, it kicked me off. And then I tried to get back on it'll kick me off again." *– Monitor without a disability*

"The early issues we had were people weren't showing up on Zoom when they were scheduled for it, and they don't let us know ahead of time." *– Monitor without a disability*

"People are often more friendly in person, particularly parents and guardians. Parents and guardians are often wary of people asking questions of or about people with IDD. It's harder to build trust virtually than it is in person." *– Monitor without a disability*

Challenges: Program Coordinators

Program Coordinators stressed the same top challenges as Monitors, including technological issues and the impersonal nature of Zoom interviews. Program Coordinators frequently mentioned that many potential interviewees lacked access to technology such as the internet or iPads, especially people who were aging. The technology issues that participants frequently mentioned included: equipment (e.g., cameras and speakers) not working, issues with getting onto or using Zoom, and teaching caretakers or support staff how to use Zoom. Program

Coordinators also mentioned the lack of comfort interviewees and their support had with technology and how that negatively impacted the interviews. Specifically, they shared that many interviewees or their support staff did not feel comfortable using technological equipment even when offered, had Zoom fatigue, and struggled to use available equipment. Also, getting everyone on the screen was sometimes challenging on the virtual platform. Monitors could not tell who was in the room. Program Coordinators also mentioned that sometimes too many people on the Zoom call at once interfered with the interviews.

Program Coordinators also spoke about difficulty establishing a rapport between the Monitor and the person being interviewed. They noted that several Monitors struggled to maintain a person's attention on Zoom, it was hard to read reactions, the Monitor with a disability may not be as easily understood through technology or be able to use as many non-verbal cues, and there was a general decrease in comfort for participants. Many Program Coordinators mentioned that it was easier for potential interviewees to cancel or not attend interviews.

In addition to losing potential interviewees due to virtual interviewing, some programs lost Monitors with disabilities due to the switch to a virtual format. Five Program Coordinators reported that one Monitor left the program, two reported that two Monitors left, and one Program Coordinator reported the loss of 15 Monitors in 2020-2021. Similarly, in 2021-2022, six Program Coordinators shared that one Monitor with disabilities left the program, one reported that two Monitors left, and one reported the loss of 15 Monitors. However, a few Program Coordinators reported gaining Monitors with disabilities during the pandemic, with one Coordinator reporting one new Monitor, one reporting two new Monitors, and one reporting hiring three new Monitors with disabilities in 2020-2021. In 2021-2022, two Program Coordinators reported hiring one new Monitor with disabilities, three reported hiring two Monitors, and one reported gaining four new Monitors with disabilities.

"Monitors needed to learn how to verbally communicate rather than using non-verbal techniques to complete surveys. They needed to make sure their team member was on the same page, the same question number, etc."   *– Program Coordinator*

"I think in the beginning of [COVID-19] and virtual monitoring, individuals were really uncomfortable and didn't want to do anything online. With support, guidance, training, patience, and time, they became more confident and saw that they could do virtual and most enjoyed it."   *– Program Coordinator*

Recommendations to Improve Virtual Interviewing

During the interviews, Monitors with disabilities were asked to share recommendations to improve virtual monitoring in the future. Many of the recommendations related directly to the challenges people faced with technology and recruitment or ensuring that interviewees would attend the virtual interviews. The most commonly shared recommendations from Monitors with disabilities to improve virtual interviewing were:

- Upgrade Monitors' Zoom access to paid Zoom accounts to prevent the call from being cut off prematurely
- Help the person being interviewed with their technology so they can participate more independently and successfully
- Give technology to people who are eligible to be interviewed whose lack of access to technology prevents them from participating
- Send out a letter to interviewees before the Monitors call to ask them to participate, so they know to expect a call to arrange an interview

Conclusion

This study assessed the transition from in-person to virtual monitoring for the IM4Q program in Pennsylvania. A mixed methods approach was conducted to capture the experiences and perceptions of Monitors and Program Coordinators from all IM4Q programs across the state. A web-based survey was provided to all Monitors and Coordinators, and follow-up interviews were conducted with 12 Monitors with disabilities to gain a deeper understanding of their experience to improve future training and support. Data collection was inclusive of the entire transition process, including training (provided before the transition), support (during the transition), and overall transition to virtual monitoring. The participants shared both positive and challenging aspects of the transition, as well as recommendations for improvement.

The results showed that transition training to support the shift to virtual interviews was valuable; Monitors' average confidence to conduct virtual interviews increased by 39.1% after training. Overall, Monitors agreed that they were adequately trained on many topics such as how to set up a physical space to conduct interviews, how to use Zoom, how to support interviewees in using technology, and how to create rapport. However, Monitors indicated that more training was needed in supporting interviewees to use Zoom and building rapport during interviews. Other recommendations regarding training included: inviting Monitors to statewide training to benefit from the knowledge shared at those events, offering opportunities for new Monitors to shadow experienced peers during interviewing, and diversifying training formats and types to meet the learning and ongoing support needs of Monitors.

Most Monitors (80.4%) also indicated that they received needed ongoing support to conduct virtual interviews successfully. While Monitors noted that technological support related to setting up and conducting the virtual interviews was helpful, they recommended additional in-person support to assist them while conducting the virtual interviews and increased access to technology for people with less access.

In general, the results indicate that both Monitors and Program Coordinators felt that the transition to virtual monitoring was successful and, in some ways, beneficial to the Monitors and the interviewees. More than 60% of all Monitors rated the overall experience as very high (8 out of 10 or higher. Although interview and survey participants shared a fairly balanced number of pros and cons related to the transition to virtual interviews, almost all Monitors with disabilities shared that they ultimately preferred in-person interviews. They felt that interactions were easier, and they did not have to deal with technical issues.

This report details the advantages and shortcomings of the transition to virtual monitoring experienced by Monitors and Program Coordinators of Pennsylvania's IM4Q program. While the overall attitude toward virtual interviewing seemed positive in survey responses and interviews, this report shared many recommendations for improvement to training, support, and interviewing processes. These recommendations outline detailed insights into ways to modify and individualize future training and support for incoming Monitors to improve virtual interviewing processes across the state. Ultimately, the results of this report can be useful to make future virtual monitoring even more successful, particularly for Monitors with disabilities.

APPENDIX A: Survey Participant Demographics

N=118

Variable	*n*	%
Primary IM4Q program		
Always on our own	7	5.93
Advocacy Alliance	19	16.10
The Arc of Lancaster/Lebanon	9	7.63
Chatham University IM4Q Program	4	3.39
CIL Opportunities	2	1.69
Community Voices IM4Q	1	0.85
Crawford County Consumer Satisfaction Team	4	3.39
Delaware County Advocacy and Resource Org	11	9.32
Grapevine Center	8	6.78
IM4Q Program of Montgomery County	1	0.85
IM4Q Program of Chester County	5	4.24
Lawrence County Community Action Partnership	2	1.69
MHA of Fayette County	3	2.54
MHA of Franklin/Fulton County	2	1.69
MHA of Southwestern PA	6	5.08
Parent-to-Parent Connections	3	2.54
St. Francis University	7	5.93
Vision for Equality Inc.	14	11.86
Voice and Vision, Inc.	6	5.08
The Arc of Indiana	2	1.69
Prefer not to answer	2	1.69
Age		
18-24	3	2.54
25-34	8	6.78
35-44	16	13.56
45-54	20	16.95
55-64	15	12.71
65+	20	16.95
Prefer not to answer	36	30.51
Gender		
Female	105	88.98
Male	13	11.02
Race/Origin		
Hispanic, Latinx, or Spanish Origin	0	0.00
American Indian or Alaska Native	1	0.85
Black or African American	7	5.93
White	109	92.37
Asian	0	0.00
Pacific-Islander	0	0.00
Mixed Race	0	0.00
Other	0	0.00
Prefer not to answer	1	0.85
Participant Group		
IM4Q Monitor with a disability	26	22.03
IM4Q Monitor who is a family member of someone with a disability	34	28.81

IM4Q Monitor who is not a person with a disability or a family member of a person with a disability	35	29.66
IM4Q Program Coordinator	23	19.49
Type(s) of Disability		
Intellectual or cognitive disability	4	15.38
Developmental disability	1	3.85
Physical disability	3	11.54
Autism or ASD	1	3.85
Mental illness of psychiatric diagnosis	6	23.08
Deaf or hard of hearing	1	3.85
Blind or low vision/vision-related disability	1	3.85
Brain injury	0	0.00
Learning disability	0	0.00
Sensory disability	0	0.00
Chronic illness	0	0.00
Other	1	3.85
Multiple Disabilities	5	19.23
Prefer not to answer	3	11.54
Years as an IM4Q Monitor or Program Coordinator		
Less than a year	4	3.39
1	21	17.80
2	10	8.47
3	15	12.71
4	7	5.93
5	8	6.78
6	9	7.63
7	6	5.08
8	2	1.69
9	7	5.93
10	12	10.17
11	0	0.00
12	1	0.85
13	1	0.85
14	0	0.00
15	2	1.69
16	0	0.00
17	1	0.85
18	0	0.00
19	3	2.54
20	5	4.24
Prefer not to answer	4	3.39

APPENDIX B: Interview Participant Demographics

N=12

Variable	n	%
Age		
18-24	0	0
25-34	3	25.0
35-44	2	16.6
45-54	4	33.3
55-64	2	16.6
65+	1	8.3
Gender		
Male	4	33.3
Female	8	66.6
Race/Origin		
White	12	100
Hispanic/Latinx	0	0
Black or African American	0	0
Asian	0	0
American Indian or Alaska Native	0	0
Pacific-Islander	0	0
Mixed Race	0	0
Other	0	0
Disability (pick all that apply*)		
Intellectual or cognitive disability	6	50.0
Developmental disability	3	25.0
Physical disability	3	25.0
Autism or ASD	2	16.7
Mental illness or psychiatric diagnosis	3	25.0
Deaf or hard of hearing	0	0
Blind or low vision/vision-related disability	3	25.0
Brain injury	0	0
Learning disability	3	25.0
Sensory disability	0	0
Chronic illness	2	16.7
Other	0	0
Years as a Monitor		
1	1	8.3
2	2	16.6
3	0	0
4	3	25.0
5	1	8.3
6	0	0
7	1	8.3
8	0	0
9	0	0
10	0	0
11	0	0
12	1	8.3
13	2	16.6
…23	1	8.3

IM4Q Center		0
St. Francis University	2	16.7
Advocacy Alliance	1	8.3
Vision for Equality	0	0
MHA of Franklin/Fulton County	0	0
The Arc of Lancaster/Lebanon	0	0
Parent-to-Parent Connections	0	0
CIL Opportunities	0	0
Advocacy Alliance	0	0
The Main Link	0	0
Vision for Equality	1	8.3
Voice and Vision, Inc.	1	8.3
IM4Q Program of Chester County	0	0
Delaware County Advocacy and Resource Org	1	8.3
IM4Q Program of Montgomery County	0	0
Vision for Equality	0	0
Chatham University IM4Q Program	1	8.3
The Arc of Indiana	0	0
Community Voices IM4Q	0	0
Crawford County Consumer Satisfaction Team	0	0
MHA of Fayette County	0	0
Lawrence County Community Action Partnership	1	8.3
MHA of Southwestern PA	2	16.7
Grapevine Center	0	0
Always on Our Own	1	8.3

*Percentages do not total 100% due to most participants identifying as having more than one disability

APPENDIX C: Survey Responses

Q1. Do you agree to participate?		
	n	%
No	0	89%
Yes	118	11%
	118	100%

Q2. What is your gender?		
	n	%
Female	105	89%
Male	13	11%
Other	0	0%
TOTAL	118	100%

Q3. Are you Hispanic/Latinx?		
	n	%
No	118	100%
Yes	0	0%
TOTAL	118	100%

Q4. What is your race/ethnicity? Pick all that apply		
	n	%
American Indian or Alaska Native	0	0%
Asian (Asian Indian, Chinese, Filipino, Japanese, Korean, Vietnamese, other)	1	0.9%
Black or African American	7	6%
Pacific Islander	0	0%
White	109	93.2%
Mixed Race	0	0%
Other	0	0%
TOTAL	118	100%

Q5. What is the primary IM4Q program you work for?		
	n	%
Always on our own	7	6%
Advocacy Alliance	19	16.4%
The Arc of Lancaster/Lebanon	9	7.8%
Chatham University IM4Q Program	4	3.4%
CIL Opportunities	2	1.7%
Community Voices IM4Q	1	0.9%
Crawford County Consumer Satisfaction Team	4	3.4%
Delaware County Advocacy and Resource Org	11	9.5%
Grapevine Center	8	6.9%
IM4Q Program of Montgomery County	1	0.9%
IM4Q Program of Chester County	5	4.3%

Lawrence County Community Action Partnership	2	1.7%
The Main Link	0	0%
MHA of Fayette County	3	2.6%
MHA of Franklin/Fulton County	2	1.7%
MHA of Southwestern PA	6	5.2%
Parent-to-Parent Connections	3	2.6%
St. Francis University	7	6.0%
Vision for Equality Inc.	14	12.1%
Voice and Vision, Inc.	6	5.2%
The Arc of Indiana	2	1.7%
TOTAL	116	100%

Q6. How many years have you been an IM4Q Monitor or Program Coordinator?		
	n	*%*
Less than a year	4	3.39
1	21	17.80
2	10	8.47
3	15	12.71
4	7	5.93
5	8	6.78
6	9	7.63
7	6	5.08
8	2	1.69
9	7	5.93
10	12	10.17
11	0	0.00
12	1	0.85
13	1	0.85
14	0	0.00
15	2	1.69
16	0	0.00
17	1	0.85
18	0	0.00
19	3	2.54
20	5	4.24
Prefer not to answer	4	3.39
TOTAL	118	100%

Q7. Pick which best describes you:		
	n	*%*
IM4Q Monitor with a disability	26	22%
Im4Q Monitor who is a family member of someone with a disability	34	28.8%
IM4Q Monitor who is not a person with a disability or a family member of a person with a disability	35	29.7%
IM4Q Program Coordinator	23	19.5%
TOTAL	118	100%

Q8. Would you mind sharing the type(s) of disability you have? Pick all that apply

	n	%
Intellectual or cognitive disability	4	17.4%
Developmental disability	1	4.3%
Physical disability	3	13%
Autism or ASD	1	4.3%
Mental illness of psychiatric diagnosis	6	26.1%
Deaf or hard of hearing	1	4.3%
Blind or low vision/vision-related disability	0	0%
Brain Injury	0	0%
Learning disability	1	4.3%
Sensory disability	0	0%
Chronic illness	0	0%
Other	1	4.3%
Multiple Disabilities	5	21.7%
TOTAL	23	100%

Q9. I was trained on how to use Zoom to conduct virtual interviews.

	n	%
Disagree (not at all trained)	1	1.1%
Somewhat Disagree (I needed a lot more training)	2	2.1%
Somewhat Agree (I needed a little more training)	7	7.4%
Agree (completely trained)	85	89.5%
TOTAL	95	100%

Q10. I was trained on how to support people being interviewed to use Zoom.

	n	%
Disagree (not at all trained)	6	6.4%
Somewhat Disagree (I needed a lot more training)	4	4.3%
Somewhat Agree (I needed a little more training)	15	16%
Agree (completely trained)	69	73.4%
TOTAL	94	100%

Q11. I was trained on how to create a rapport with people I interview virtually on Zoom.

	n	%
Disagree (not at all trained)	3	3.2%
Somewhat Disagree (I needed a lot more training)	3	3.2%
Somewhat Agree (I needed a little more training)	16	13.8%
Agree (completely trained)	75	79.8%
TOTAL	94	100%

Q12. I was trained and/or given advice on how to make a quiet, safe, and private place for virtual interviews.

	n	%
Disagree (not at all trained)	3	3.2%
Somewhat Disagree (I needed a lot more training)	2	2.1%
Somewhat Agree (I needed a little more training)	7	7.4%
Agree (completely trained)	93	87.4%

TOTAL	95	100%

Q13. How many hours of training did you get to transition from in-person to virtual interviewing?

	n	*%*
Less than 1 hour	5	6%
1-2 hours	10	12%
2-3 hours	18	21.7%
3-4 hours	18	21.7%
4-5 hours	18	21.7%
5-6 hours	0	0%
6-7 hours	4	4.8%
7-8 hours	3	3.6%
8-9 hours	0	0%
9-10 hours	1	1.2%
10+ hours	6	7.2%
TOTAL	83	100%

Q14. The amount of training overall (including NCI training) I got to transition from in-person to virtual interviewing was appropriate.

	n	*%*
Disagree (not at all trained)	4	4.3%
Somewhat Disagree (I needed a lot more training)	1	1.1%
Somewhat Agree (I needed a little more training)	11	11.7%
Agree (completely trained)	78	83%
TOTAL	94	100%

Q15. I was trained in a way that was accessible to my communication, learning, and/or support needs.

	n	*%*
Disagree (not at all trained)	1	1.1%
Somewhat Disagree (I needed a lot more training)	0	0%
Somewhat Agree (I needed a little more training)	5	5.4%
Agree (completely trained)	87	93.5%
TOTAL	93	100%

Q17. How confident did you feel conducting Zoom interviews before receiving training for virtual interviewing?

	n	*%*
0-Not at all confident	6	6.4%
1	5	5.3%
2	2	2.1%
3	3	3.2%
4	5	5.3%
5	13	13.8%
6	12	12.8%
7	5	5.3%
8	12	12.8%
9	5	5.3%
10-Extremely Confident	26	27.7%

	94	100%

Q18. How confident did you feel conducting Zoom interviews after receiving training for virtual interviewing?

	n	%
0-Not at all confident	0	0%
1	0	0%
2	1	1.1%
3	1	1.1%
4	0	0%
5	1	1.1%
6	3	3.2%
7	5	5.3%
8	13	13.8%
9	17	18.1%
10-Extremely Confident	53	56.4%
	94	100%

Q19. How would you rate the overall experience of switching from in-person to virtual monitoring?

	n	%
0-Not good at all	1	1.1%
1	0	0%
2	1	1.1%
3	2	2.2%
4	0	0%
5	6	6.6%
6	5	5.5%
7	3	3.3%
8	7	7.7%
9	19	18.7%
10-Excellent	49	53.8%
	91	100%

Q20. I have received an appropriate amount of support regarding issues with virtual interviewing from the Program Coordinator or other IM4Q staff.

	n	%
Disagree (not at all supported)	1	1.1%
Somewhat Disagree (I needed a lot more support)	0	0%
Somewhat Agree (I needed a little more support)	5	5.4%
Agree (completely supported)	74	80.4%
N/A I have not experienced issues or needed additional support	12	13%
TOTAL	92	100%

Q21. I was able to get people involved during virtual interviews the same way I did when I conducted in-person interviews.

	n	%
Less than before	18	20.5%
About the same	55	62.5%

More than before	15	17%
TOTAL	88	100%

Q22. I was able to get the same information from people during virtual interviews as when I conducted in-person interviews.

	n	%
Less than before	12	14%
About the same	60	69.8%
More than before	14	16.3%
TOTAL	86	100%

Q23. How would you rate the overall virtual monitoring experience?

	n	%
0-Not good at all	2	2.2%
1	1	1.1%
2	1	1.1%
3	0	0%
4	2	2.2%
5	2	2.2%
6	5	5.4%
7	12	12.9%
8	12	12.9%
9	17	18.3%
10-Excellent	39	41.9%
		100%

Q29. We trained Monitors on how to use Zoom to conduct virtual interviews.

	n	%
Disagree (not at all trained)	0	0%
Somewhat Disagree (I needed a lot more training)	0	0%
Somewhat Agree (I needed a little more training)	1	4.3%
Agree (completely trained)	22	95.7%
TOTAL	23	100%

Q30. We trained Monitors on how to support the person to be interviewed to use the Zoom platform.

	n	%
Disagree (not at all trained)	0	0%
Somewhat Disagree (I needed a lot more training)	0	0%
Somewhat Agree (I needed a little more training)	5	21.7%
Agree (completely trained)	18	78.3%
TOTAL	23	100%

Q31. We trained Monitors on how to create a rapport with the interviewee on a virtual platform.

	n	%
Disagree (not at all trained)	0	0%
Somewhat Disagree (I needed a lot more training)	1	4.3%
Somewhat Agree (I needed a little more training)	6	26.1%
Agree (completely trained)	13	69.6%

TOTAL	23	100%

Q32. We trained Monitors on how to set an appropriate, quiet, safe, private setting for virtual interviews.		
	n	*%*
Disagree (not at all trained)	0	0%
Somewhat Disagree (I needed a lot more training)	0	0%
Somewhat Agree (I needed a little more training)	5	21.7%
Agree (completely trained)	18	78.3%
TOTAL	23	100%

Q33. How many hours of training did you facilitate to transition Monitors from in-person to virtual interviewing?		
	n	*%*
Less than 1 hour	0	0%
1-2 hours	3	13.6%
2-3 hours	7	31.8%
3-4 hours	1	4.5%
4-5 hours	3	13.6%
5-6 hours	0	0%
6-7 hours	3	13.6%
7-8 hours	1	4.5%
8-9 hours	1	4.5%
9-10 hours	0	0%
10+ hours	3	13.6%
TOTAL	22	100%

Q34. Did you offer any specific training to Monitors (excluding NCI training) with disabilities that was different from what was offered to non-disabled Monitors?		
	n	*%*
No	14	63.6%
Yes	8	36.4%
TOTAL	22	100%

Q35. Have you needed to provide any additional training or support to Monitors with disabilities immediately before the interviews were conducted?		
	n	*%*
No	12	52.2%
Yes	11	47.8%
TOTAL	23	100%

Q36. Did you offer any specific equipment/environmental adaptations to Monitors with disabilities that were different from what was offered to non-disabled Monitors?		
	n	*%*
No	19	82.6%
Yes	4	17.4%
TOTAL		100%

Q37. Did you offer any specific ongoing support to Monitors with disabilities with the remote format that was different from what was offered with the in-person monitoring?		
	n	*%*
No	15	65.2%
Yes	8	34.8%
TOTAL	23	100%

Q39. Were there Monitors with disabilities who were unable to continue as Monitors because of the switch to remote format? In 2020-2021		
	n	*%*
No	14	63.6%
Yes	8	36.4%
TOTAL	22	100%

Q40. Were there Monitors with disabilities who were unable to continue as Monitors because of the switch to remote format? In 2021-2022		
	n	*%*
No	12	57.1%
Yes	9	42.9%
TOTAL	21	100%

Q41. How many Monitors with disabilities left the position in 2020-2021 due to the switch to remote format?		
	n	*%*
1	5	62.5%
2	2	25.0%
15	1	12.5%
TOTAL	8	100%

Q42. How many Monitors with disabilities left the position in 2021-2022 due to the switch to remote format?		
	n	*%*
1	6	62.5%
2	1	25.0%
15	1	12.5%
TOTAL	8	100%

Q43. Did you gain new Monitors with disabilities due to the switch to remote format? In 2020-2021		
	n	*%*
No	19	86.4%
Yes	3	13.6%
TOTAL	22	100%

Q44. Did you gain new Monitors with disabilities due to the switch to remote format? In 2021-2022		
	n	*%*
No	16	72.7%
Yes	6	27.3%

TOTAL	22	100%

Q45. How many Monitors with disabilities did you gain in 2020-2021 due to the switch to remote format?		
	n	%
1	1	33.3%
2	1	33.3%
3	1	33.3%
TOTAL	3	100%

Q46. How many Monitors with disabilities did you gain in 2021-2022 due to the switch to remote format?		
	n	%
1	2	33.3%
2	3	50.0%
4	1	16.7%
TOTAL	6	100%

Q47. How would you rate the overall experience of switching from in-person to virtual interviewing?		
	n	%
0-Not good at all	0	0%
1	0	0%
2	0	0%
3	0	0%
4	0	0%
5	2	8.7%
6	3	13%
7	4	17.4%
8	7	30.4%
9	4	17.4%
10-Excellent	3	13%
		100%

APPENDIX D: Qualitative Survey Responses

Q16. Is there anything you want to add about the training you received for virtual interviewing?
IM4Q Monitor who is a family member of someone with a disability
Sometimes circumstances present themselves that we cannot always feel prepared for, but you always learn from them and improve for the next interview. It helps having knowledgeable peers to discuss scenarios with and a supervisor who is very supportive and encouraging.
They did a great job talking about all the areas in training
The visual samples were very helpful
I thought it was totally appropriate
I am not tech-savvy. So, Vera was very patient reviewing what she had already told me - I need to actually do things on the computer a few times to get it
Our Coordinator held a team Zoom where we were thoroughly trained and had the opportunity to ask questions and explore all of the Zoom options.
I felt it was very informative
Everyone was professional and patient
I used Zoom before. I needed no training on it.
I really enjoyed learning how to use Zoom
It was very helpful. I was familiar with Zoom, but it helped me be able to help others.
IM4Q Monitor who is NOT a person with a disability or a family member of a person with a disability
Great experience and very thorough
I don't remember receiving training specific to using Zoom for IM4Q purposes.
I was trained on how to conduct the interview, but I need more training on how to be in charge of the zoom program.
I think it would be helpful to shadow other Monitors for experience, especially with the NCIs.
I never did an in-person interview.
I was already using Zoom daily for tutoring college students, so my "training" was not from IM4Q. While I was not setting up the Zoom interviews for IM4Q, I was able to assist the person who was with some of the technical difficulties.
My supervisor did an excellent job training our staff for virtual interviewing.   She was always available to answer questions and always sent us out step-by-step sheets explaining what we had to do and how to do it.
It was very stressful and hectic
I am employed at Always On Our Own, Inc. in the office as administrative assistant, data entry. I Monitor as needed by our organization and have been trained over the years and through the transitions from in-person to virtual through and by being part of the entire process of the IM4Q, NCI, AAW, and QA&I survey years. Through meetings, trainings working with the director, and by my familiarity with putting together the training manuals for our organization. I have the opportunity to see how the changes from in-person to virtual have been working from being part of the office preparation for the survey season as well as being in communication throughout the year with Monitors, consumers, and their supports people. It has helped me to get a broader sense of where the strengths and weaknesses are in the process.
I wish Monitors were invited to the state-wide trainings. Monitors are truly missing out on important information that could greatly help them out during interviews that other staff learn during state-wide trainings.

excellent support system/training
Very helpful.
I began working for the program after virtual was introduced and never did an in-person interview.
Excellent training and staff
IM4Q Monitor with a disability
It was very helpful, and there was continued support if I needed it. The Program Coordinator did a great job making me feel completely comfortable with doing surveys.
'-You could start with teaching us how to use Zoom, to begin with. Not everyone is equally tech-savvy.
More access to training materials. There were some I would like to go back to and review. And maybe others I would like to see in my own free time.
I was hired around the time that virtual interviewing was already in place, so I do not have experience with in-person IM4Q surveys. I will need to learn this.
At my one-on-one training, the process was explained a little more thoroughly than when we were in a group.
I worked with great employees who were always nice.
The people I work with make it easy to do my monitoring job. I enjoy working with them
It is hard doing it by zoom

Q24. What were the benefits or good things about virtual interviewing?
IM4Q Monitor who is a family member of someone with a disability
Able to reach people that live in remote areas. Less driving time and less wear and tear on vehicles.
Keeping everyone safe during covid.
Some people just love to use zoom. They love seeing themselves on camera. Also puts them at ease.
Safety of all involved from viral exposure, still being able to conduct interviews, connecting with the people we interview even though circumstances weren't ideal, team members still being able to be involved/working
Convenience
No driving
More involvement from family not in the area. Easy to do. No risk of infections
No traveling time which is convenient for completing other work that must be done at the office.
Convenient for persons with little or no transportation access and also little or no time to travel
Not having to travel
I feel the consumers weren't as scared as having strangers in their homes. No worries of them being sick. Didn't have to worry about someone flipping out because I asked a question they didn't like.
Easier to schedule can reach more people
We seem to get more interviews with virtual interviewing and not having the risk of anyone catching anything life-threatening with covid 19.
I found people to be more accessible for scheduling
Did not have to travel! On their part, I think that the participants were still comfortable in their environment without a stranger coming in
Being able to still complete even when it wasn't possible to be in person
Saving gas and time driving to the different residences.
No exposure to virus.

I liked it, and I think the people liked it worried about someone coming into their home and we could see each other over the virtual and I think they felt very confident
With virtual interviewing, we didn't need to worry about bad weather causing the cancellation and/or rescheduling of interviews.
Virtual interviewing presented neither good nor bad experiences. I saw no difference at all.
Less traveling
It is easy to do it on Zoom. I didn't have to do a lot of traveling. When I went into town, I would have to find a parking space. But I liked it both ways.
I believe the people are more comfortable since we are not coming in their homes.
It was more flexible as far as scheduling.
We could include people that might not have been able to participate if in person.
We were safer from COVID Spreading; we were free from traveling and using gas and busses.
A unique experience.
We can get more visits done without all the traveling and still interact with the individuals
More relaxed, no travel, more private
IM4Q Monitor who is NOT a person with a disability or a family member of a person with a disability
It held a great attention span for them you concentrate on
Safer experience for Monitors, for sure.
Less time traveling and finding locations. Scheduling interviews went smoothly.
Virtual interviewing allowed the individuals participating in the survey and the Monitors conducting the survey privacy on both ends and comfort in their own environments. It cut down on time, and for the Monitors, it cut out the need for travel.
Elimination of travel time and weather cancellations
I could participate without having to travel. This is my second job, so I was able to come home from work and jump on. My availability is greater with virtual interviews. Also, many families are uncomfortable with strangers entering their homes, no matter how official our work is made to them. I think many families liked virtual more than in person.
Reduced time and expense due to no travel
It saved on travel, time, and gas.
Less time and money the Monitor has to spend driving to a location
More convenient for scheduling
Accessibility
It was beneficial when the consumers and their families were present and comfortable with the technology, and it meant that we could continue during the lockdown. It also provided visual contact for consumers, especially before their programs were set up to reach them virtually.
I think it was easier to get clients to agree to being interviewed. I liked not having to travel, especially during bad weather.
One of the benefits was not having to worry about traveling in bad weather. The survey could be completed, and we didn't need to worry about rescheduling.
No chance of catching or spreading Covid
More convenient, safer environment for interviewer.
Sometimes easier to schedule.
Talking with them and a helper

The pros of virtual interviewing are that I believe it is a more comfortable setting for the consumer once you are able to get the entire thing set up, which is a bit more difficult than simply meeting them in person. However, once the set-up is completed, it is usually a more relaxed situation for the consumer and their families. I have found that when it comes to consumers in community homes, it seems to be an easier and more convenient way for the staff and or support staff to schedule when it is a Zoom interview rather than a visit.
Easier time-wise.
Virtual interviewing was a flexible and convenient way to work from home without risk of exposure to sicknesses, which served well for IM4Q staff with underlying illnesses.
Time convenient. No driving
less travel for Monitor
This was my 1st year. I have only done virtual interviews
Time saved
Comfort level for all parties, Virtual is much easier to participate on time
Safety was most important with COVID in the air and transferrable
The comfort and how to relax the person felt with new technology.
Some people were more comfortable with this arrangement.
Safer for both the Monitor and the participant, easier to schedule for Monitors, less travel time
IM4Q Monitor with a disability
I didn't have to travel anywhere. Flexible schedule allowed me to do more.
The majority of participants who conducted the interviews expressed that virtual interviewing was much more convenient and less time-consuming than in-person.
We were able to continue getting surveys done with consumers
It takes less time.
I had their attention, and there seemed to be less interruptions.
At times it made scheduling easier due to not having travel
I did NOT have to worry about accessibility of the houses
You are still able to engage with the individuals and can still pass along information.
The benefits of virtual interviewing were that you could be at home and still do a survey.
Less travel time
It is difficult to travel to interviews. With Covid, it kept me safe not being around other individuals.
She likes everything
Being able to ask people questions and get answers from them. I loved it!
I was able to stay at home and conduct the interviews online.
Easier to do from home, especially during bad weather. During Covid still able to complete surveys.
I really enjoyed it, especially being at home
It's a little easier because you just go to the office instead of trying to find someone's house.
Not traveling
Easier to get done

Q25. What were the challenges you experienced with virtual interviewing?
IM4Q Monitor who is a family member of someone with a disability

Trying to get people to download the apps to use was more time-consuming, and having to send reminders for the date and time of the interview.
Technical difficulties
Some individuals were very difficult to connect with over a screen; sound was sometimes very compromised depending on the equipment of the interviewee/provider, challenging to support team members to the degree needed over a screen, and limited time with them since we were not traveling to interviews together, not being able to assess the physical surroundings, privacy somewhat limited as individuals need assistance with technology
Some technical problems
Very hard to have a meaningful connection with people. People were less willing to share because they always had to have someone with them to help with zoom. If you are going to use a platform, shouldn't you train the families and DSPs about the tech? We are not IT professionals. It was hard to keep people on topic.
Didn't see the house, some people w disabilities didn't engage as much
Several internet-related problems. A few challenges from people not used to internet. An elderly parent who declined the survey due to not wanting anything to do with the internet.
Some people had a hard time with the technology or internet access After that engaging was more difficult
Not being able to see the home or move about more
Interviews that were no shows and no one called us to let us know or reschedule
Occasional tech issues, can't see home
Not having a call when interviewing needs to be rescheduled. I also am disappointed in being told that we can't interact with the persons giving us the interview because we are now not allowed to share personal info when some of that did help with the consumer being interviewed to open up, knowing we aren't bad guys and we just want to know how they are doing makes us seem rude when we can't respond with maybe... they are not alone, and we go through the same things and maybe give them a little peace in mind we are humans to just like them.
More distractions in the virtual environment
Just technical, really, which I eventually overcame.
Consumers being able to log on
Some people didn't have access to Zoom
I liked it, and I think the people liked it worried about someone coming into their home and we could see each other over the virtual, and I think they felt very confident. Some of the people said that we asked the same question a couple of times over and over again
Initially, with individuals not familiar with zoom meetings. As time went on, most seem more comfortable with the technology.
I can't think of any.
Individuals found it easier to skip the interview simply by not answering the phone.
When I would freeze up on zoom or the other person froze up on zoom, and when someone was to be on, and they didn't come on, and they didn't call back to set up another time
Unable to access surroundings very well
Some people have internet issues where they live.
Some people did not have technology needed to participate. The virtual aspect caused me a lot of anxiety. Sometimes there were connectivity issues on both ends. It was easier for people to just not show up on zoom. Quite a few people refused to do zoom because they were not comfortable with it and preferred an in-person interview.

That the families were not familiar with zoom, the families hadn't downloaded zoom prior.
IM4Q Monitor who is NOT a person with a disability or a family member of a person with a disability
Communication barriers with using zoom in many cases. Struggling, In many cases, from less-than-ideal internet connections,
At times those being interviewed needed additional assistance with the process through phone calls and support.
Occasionally the volume or clarity of sound would inhibit conversation or even delays with connection.
Many no-shows. Seemed somewhat distant, just not quite the same rapport.
Being sure individuals were alone or not being influenced by others around them due to the limited scope of the camera. Working with families and staff to get the technology to work (not being tech support).
Interviewee's poor internet connection and limited computer skills; could not see where they were living in order to evaluate the home and family or staff
Some people we were interviewing didn't have a computer or tablet. We were able to do the survey by smartphone, though, but it seemed a little more challenging for some people. Also, you don't have quite the same rapport with people that you have in person.
Consumers and their family/staff/etc. Not knowing how to use virtual apps; it took a lot of time to provide assistance and e-mail invitations for surveys
Having enough service to properly connect and stay connected. Also, the older generation is unfamiliar with the technology it takes sometimes
Monitor screen is too small
The difficulties were that some people tried to have the interview while they were in moving cars, some people didn't notify the scheduler that they couldn't keep the appointment, and some couldn't deal with the technology. The biggest drawback, though, was the narrow physical view we had of the home and residents. We couldn't see problems that we would have noticed by being there in person, touring the house, and observing interactions between/among the residents. It would have been better for the Monitors if the survey answers could have been completed in an online format, too.
It was difficult accessing the homes our clients were living in.
One of the challenges was some of the individuals did not have access to a good internet connection due to living in such rural locations.
The survey is entirely too long, and the people getting surveyed would get bored or lose interest; most would say no when asked if they wanted a break, but I noticed their enthusiasm level would go way down about halfway through the survey
Harder to schedule appointments.
technical issues
Getting used to the difference
I have found that the initial process of calling people, which is actually in most cases a "cold call," seems to be intimidating to all parties involved, from the parents or caregivers to the consumer if they live alone, to guardians and support staff. The challenge really comes in for the Monitor initiating the call to schedule the interview, to convince the individual, family, or caregivers that this is not a prank or suspicious call, that it is a valid interview while also explaining that it in no way will harm their current services, funding, etc. Also, to help people to understand why the interview should take place while it still being optional for them, as this is a question often asked by the individuals or parents, they automatically would usually prefer to refuse and not be bothered. I have also found that increasingly many individuals who are less fortunate financially do not want to use their cell phone data to engage in this interview as many of their plans are limited and/or they do not have Wi-Fi in their homes.
Older consumers are truly less interested in any kind of Zoom experience and, unless they have a readily available staff on hand, will usually always refuse.
Parents with young children with Intellectual Disabilities and/or Autism are rarely open to giving

information, understandably so without long conversations and many assurances often from their SC that this is ok to participate in, so generally, the set up for a cold call followed by a Zoom meeting being scheduled takes far longer for the Monitor to set up at the start than a simple visit. However, as I said above that, once that much longer process has been successfully set up, the consumer and staff are usually more comfortable with being in the comfort of their own homes and spaces. I have also found that with virtual interviewing, it is much easier to lose the person, or they are more comfortable with simply ending the interview early or simply walk away from the interview then they use to when we visited them in person. My overall estimation after being involved in the in-person interview experience prior to Covid and now the virtual interview process; is that the challenges of Zoom and virtual interviews far outweigh the benefits of the in-person, that we have far more rejections and no-shows, that the time that the Monitor puts into the initial scheduling process is what is creating situations that includes more Monitor turnover and quitting early in the IM4Q interview season as they do not think it is financially feasible to do this work.

Very difficult with nonverbal clients

Not being able to see the entirety of the participant's home environment (to make sure their home environment was suitable for living). The usual technology issues, like Zoom, links not working, and videos cutting out because of poor internet connection.

People not being alone to be interviewed due to technology issues, not really private

Technical issues for Monitor and client

Tech issues, not connecting with the person.

Internet connections

Technology at times does not always work 100% of the time; some may have microphone problems, poor picture quality at times

None that were handled

Some loss signals.

Technology problems.

Internet/technical issues, participants forgetting about interview, not being able to see the participant's environment

IM4Q Monitor with a disability

When the individual or family didn't have a computer.

The only challenges I experienced with virtual interviewing were occasional issues with connection, the participants knowing how to connect to audio, and participants becoming comfortable with utilizing the chat feature.

Can be harder to build a rapport with consumers

Sometimes it was hard to get connected electronically with the person to be surveyed. It was also hard to tell what the environment was like at the place where the person was interviewed. And it was hard to see what the home staff were doing or what they might have been saying to the person that was being interviewed while the interview was being conducted.
-Finally, and maybe most importantly, it is my humble opinion that we are asking way too many questions to the people that are being interviewed. I believe that less questions could be asked while achieving the same desired results. And I think more people would be willing to do the interview if we were to lower the number of questions being asked, both now and if they are asked to do an interview again sometime in the future. Basically, I believe that, in this case, less would equal more.

Sound - hearing the person when staff did not have equipment properly set up.

People did not always want to use zoom and were not as talkative as they would have been during in-person. I think there was less engagement from some participants that would have been more involved in the survey if it was in person.

You could not see much of the house, for example, if something needed to be repaired
Many people do not have access to technology. People have also had trouble with an internet connection. This makes scheduling and communication hard.
The challenges of virtual interviewing are that you could not see the person's home.
Scheduling issues
A challenge was not being able to see the interviewee's living situation.
When they did not show up
When people don't show up or show up on time.
There were technical difficulties with the interviewee, who didn't know how to use Zoom.
Person be interviewed forgetting their appointment.
Internet service not working sometimes
Trying to get people on the interview.
People canceling on us
We could not see the whole place where the person lived or what the staff were doing during the interview. It's also a little harder to get a feel for the place when you're not actually there.
Technology troubles
not very interactive

Q26. Did you need new technology to conduct interviews virtually?
IM4Q Monitor who is a family member of someone with a disability
Myself, no. but individuals? Some, yes. [No]
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No

No
Not that I know of. [No]
Not sure. [Excluded from Analysis]
Yes
Yes
Yes
Yes
Yes, and it was provided from our organization.
Yes, I did. I needed a new iPad.
Had to download Zoom. [Yes]
I bought a Chrome Book for backup in case my computer didn't want to work. I need to get headphones for when I use it in the kitchen, there is a lot of noise, and I've got to get better Wi-Fi so I can do it in another room. [Yes]
IM4Q Monitor who is NOT a person with a disability or a family member of a person with a disability
I don't, but perhaps the other IM4Q Monitors do? [No]
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No, yes [Excluded from Analysis]

No, I was already completely set up through my work.
No, was familiar with Zoom.
The program was able to borrow tech from The Arc of PA to assist.
Yes
Yes
Yes, I needed to get a new laptop.
IM4Q Monitor with a disability
I did not. [No]
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No. I have a Mac computer and am quite familiar with using it.
Yes
Yes
Yes
Yes

Q27. Did you need to create/find a new environment to conduct interviews virtually?
IM4Q Monitor who is a family member of someone with a disability
I was able to use my home office without any issues. [No]
No
No
No
No
No
No

No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No, I have two rooms I can use. [No]
No, my apartment was sufficient. [No]
No. I think they feel comfortable in their own home in your own setting. [No]
Yes
Yes
Yes, I needed to organize a professional background for Zoom [Yes]
I made a space in my home that was private. [Yes]
I have a small house, so I usually had to kick people out of the room that I needed. [Yes]
IM4Q Monitor who is NOT a person with a disability or a family member of a person with a disability
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No

No
No
No
No
No
No
No
No
No
No
No, as I already had this set up for my work.
Nope
Used kitchen table [No]
Somewhat, but no problem in locating a good place at home. [Yes]
Yes
Yes
Yes
Yes
IM4Q Monitor with a disability
I did not [No]
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
No
Sometimes [Yes]
Yes
Yes

Yes
Yes. I needed to straighten up working area and make it more professional looking. With maybe a little cleaning! A good thing.

Q34a. Please describe differences in training:
IM4Q Program Coordinator
We provide shadowing for Monitors, training on the specific tool questions and answers, the NCI training, as well as how to sign in to virtual training along with a cheat sheet they keep, asking good follow-up, developing rapport, how to call and verify the appointment, how to develop considerations and signs of quality, and after shadowing we work with the person to ensure they understand the tool, the questions, how to make sure all the paperwork is complete, and anything else they need.
Parts were 1:1
Monitor with disability had all questions recorded on an IPAD. His support person was also trained.
We did a group training as well as individual sessions if needed. We used examples as well as different scenarios that might possibly happen. We also had in-person training if needed for more hands-on assistance. I was available at the beginning of each survey to assist with any issues.
Most of the extra training was how to use the new system, e.g., zoom. We needed to practice reinforcing the process. We did this for all Monitors; however, the support was ongoing with each interview with extra time before each interview to make sure all was set up correctly.
This training was one-to-one in addition to group training.
only as needed per persons disability
More one-on-one time was needed for some Monitors.
Q35a. Please describe any additional training or support immediately before interviews:
IM4Q Program Coordinator
We work with them on the making sure they have the correct tool, the questions they will be asking, going over the pre-survey with them, one Monitor; we have had to take the tool and take out all of the Monitor instructions as they read everything word for word, so it is only the question to be asked to help them.
We had Monitors shadow for a couple interviews to observe how things were done, background environments, Monitor interactions, etc. I was on the phone with them, talking through the steps needed to get on zoom, and provided feedback once logged on.
10 to 15 mins before to check all was working correctly. Confirm the environment was quiet and headphones were in place if needed.
Had to do a review; it still was confusing for the Monitors
setting up the ZOOM on iPad
Again, our Monitors with disabilities always receive additional one-to-one training.
I participated in surveys with the Monitor and the Monitor with disabilities to coach both of them through the survey process. The Monitor without disabilities was coached on how to support the individual with disabilities. For example, if a Monitor struggled with writing words, the Monitor with disabilities took notes and provided them with the survey packet.
Helping in connecting to Zoom using link sent and troubleshooting use of webcam.
Review on how to open emails and find the right link before an interview.
Logging on issues, resending the link
Q36a. Please describe differences in equipment/environmental adaptations:
IM4Q Monitor who is a family member of someone with a disability
Monitor used an IPAD to ask the individual questions. His support person aided in using facilitative communication.

We offered a private space in our office if an individual needed it as well as having Arc Staff available to set up zoom and equipment. We also offered iPads if needed.
Tablets were available for use if needed

Q37a. Please describe differences in support from virtual to in-person monitoring:

IM4Q Program Coordinator
Constant and ongoing contact
I had individuals come into the office so I could demonstrate and go over the steps of logging in and attending a zoom session. Like in person, I offered ongoing support, but with surveys being virtual, it was more technology-based.
gave refreshers on training when needed
There were more check-ins and additional assistance making sure the Monitors were able to get into the Zoom meetings.
Electronic versions as needed
I personally picked up and dropped off survey packets. I spoke with them at this time to see how the survey process was going, and if they needed any additional assistance, I provided it. One Monitor lives at home with family, and their family member taught them how to use Zoom. The other lives in a group home. He received support from his staff initially to use Zoom.
Support was provided in accessing Zoom link via email to successfully join Zoom meetings. Also support was also provided to successfully make webcams work to ensure that all individuals could be seen during meeting. Less support was needed regarding transportation as all meetings were over a Zoom Video Meeting.

Q38. Please describe how Monitors with disabilities took the NCI pre-online training: For example, individually or in a group? At home with support or in the program office? Write in Response

IM4Q Monitor with a disability
One Monitor in the program office
in person
They took it on their own or with their family member they are usually paired up with.
Individual
The training was taken at home with support.
This was all based on the individuals' specific needs. I provided several options for completing the training. With some individuals, we went over the trainings together after each chapter; some also took them at home with support. I provided continuous support throughout the process. It seemed as though support was needed more often for logging back in and getting started after stopping.
I was hired in the middle of the IM4Q year, didn't get to hire any new self-advocate Monitors for the current year
My Monitor with a disability chose not to participate in monitoring this year due to his physical and mental health issues
Individually at home.
individually
in a group
individually, with support at the office

All Monitors took the training as a group. However, after the training, all Monitors were offered additional one-on-one time if needed. Only the Monitors with disabilities accepted the additional training.
Based on their preference of individual and/or group, in-person supports were available as needed.
We did the NCI pre-online training together as a group. Monitors who wanted to do it on their own were able to do so; however, the majority of Monitors, including those with disabilities, chose to do it together as a group. We recorded the training on Zoom so that it could be used throughout our agency.
NCI pre-online training was taken at home with support of Program Coordinator.
In the program office
with support in a group

Q48. What were the benefits or good things about virtual interviewing?
IM4Q Program Coordinator
Less traveling time. Able to schedule more in one day. Scheduled more in their day programs.
Less worry in visiting high drug/crime areas, less stress in people having to worry about Monitors seeing their home/ cleaning their homes prior to our visits
Save on travel since we are so very rural, which has saved on time and money for the program. With us being so rural, it allowed us to do interviews closer together because we did not have the travel time in between them.
Lack of travel, less time wasted when people do not show
There was no a need to travel to the person's residence. For some reason, interviews were easier to schedule. People were more receptive to speaking with us when they learned we did not need to come to their place of residence.
No need for transportation. Flexible scheduling being able to cut out drive time or needing to depend on someone else's schedule.
Virtual interviewing allowed Monitors that needed accessibility to be able to access any environment an interview was being conducted. It saved travel time and therefore allowed for more flexibility for interview timing. e.g., two interviews could be conducted relatively close together if needed. No loss of interviewing ability due to bad weather, especially helpful during winter months.
Allowed for more flexibility when scheduling resulting in scheduling individuals more efficiently, supports modern technology that everyone uses more and more every day.
Easier access and scheduling for some interviews, no driving expenses; we actually obtained a few that would never allow us to come to the home to interview the individual
Some people were more comfortable not having strangers in their home. It was less invasive. With having a tight budget, it was better financially since travel wasn't involved, which saved money.
convenience, especially to individuals living in family settings cost saving of travel
Eliminated the costs of transportation and costs of such for "no-shows" in the field. Kept anxiety down regarding COVID transmission.
Some consumers were easier to schedule
Did not have to travel
Parents of individuals who worked during the day found it easier to allow the individual to answer questions as they completed their personal household everyday chores.
It is difficult for Monitors with disabilities to get to an interview. So having the interviews completed virtually negated the need for Monitors with disabilities to travel to and from interviews. Our teams were set up so that Monitors with disabilities were given a Zoom link and did not have to create the meeting. The link was sent to them by email in addition to the other attendees. They were instructed to

join the meeting a few minutes early in case there was an issue with the connection, etc.

Other benefits included non-travel time for all Monitors. If an individual did not connect to the meeting, there was no an issue of time spent going out to the house.

Some families preferred the method over the in-person option. The second year was much easier than the first due to families being overwhelmed with zoom when covid hit.

* Travel wasn't an issue in inclement weather.
* It allowed individuals another option for interviewing.
* People who may not have been able or willing to participate before now could and were willing to participate.
* If a Monitor was under the weather, they were still able to participate because they wouldn't have been passing germs to individuals.
* People who have behavioral challenges that sometimes pose barriers to being interviewed were now able to be interviewed.
* It allowed us to be able to see people when many people were still not yet being seen by Supports Coordinators or provider staff.
* By the second year, most people were already familiar with Zoom and had access to it and technology.

Easier for those with physical disability to help out more due to in-person some locations are as accessible

For certain individuals we were interviewing, they were more willing to participate for various reasons. Individuals with health conditions or that were immune compromised felt safer without needing to have close contact with us in their homes. Other individuals appeared to like the Zoom meetings as they were easier to fit into their schedules and less invasive than having us come to their homes.
Another benefit was that virtual meetings benefited Monitors who had physical limitations as they have difficulty accessing some individuals' homes that do not have handicap access. Monitors with health conditions also felt safer during the Covid-19 pandemic.

No travel time involved, no weather barriers for winter scheduling, able to do different counties in the same day, able to meet with several people in different locations at the same time.

We got to meet with folks that normally wouldn't want us to come in their homes due to their routines changing.

No travel or going into individuals' homes didn't have to cancel due to weather conditions, more flexible with times to conduct surveys

Q 49. What were the challenges you experienced with virtual interviewing?
IM4Q Program Coordinator
Getting people to return calls. Individuals not having access to technology.
teaching elderly or those not familiar with Zoom or Teams how to download the apps/use them
We are very rural, and some places did not have good internet service. Some people did not want to do the survey virtually and wanted it face to face, and we were not permitted to do it that way. They were extremely adamant about wanting it in person.
Staff used access to internet and platform to avoid participating
Sometimes the connection wasn't the best. Also, sometimes it was difficult to establish a rapport with the individual.
Lack of technology. The Monitors seemed to be more comfortable in person, being physically beside the other Monitor.
Creating rapport with some individuals can be more challenging. Interviewees tend to cancel easier than face to face. Being able to observe the environment is much more challenging. Equipment not working as it should or glitches in internet access. Some participants do not have the technology or equipment to join virtually. This is very true with elderly family members.

Some individuals did not know how to access zoom; although this was an issue at times, it was almost always able to be worked out for the survey to be conducted.
Technical difficulties with internet/zoom platform at times, difficulty for the individuals/parents of older individuals with navigating the computer system/virtual platform system, missing seeing the home environment in its entirety,
At times people had problems getting on Zoom or getting their sound to work. Some people refused to do Zoom. They wanted to do the survey face to face. Some people did not have access to the internet. Sometimes the Monitor's internet would go out during a survey. We weren't able to see the person's surroundings. Sometimes there were too many people on Zoom because of the provider having a couple of people on in addition to the two Monitors. It was easier for people to not show up to do the survey. Sometimes it was hard to keep the person's attention when it was on Zoom.
Some individuals with disabilities had difficulties using the virtual interview Some families did not have access to internet
Missed the ability to get a clear view of the residence's cleanliness and whether or not the residence felt like a "home." More challenging with some interviewees to establish a rapport over ZOOM If staff or family support was needed for interview, it was sometimes a challenge to get everyone on screen. We lacked the ability to see if there were others within earshot of the interview where the individual was Zooming.
Lacking face to face. Hard to read some of the reactions
No shows
Explaining to individual caretakers who have never been on ZOOM everything will be set up on the iPad, and they would not have to do anything other than take iPad in the home.
Challenges were that some individuals (especially those with older family members) had difficulty connecting to a platform. It was also a challenge that sometimes individuals just did not log on to a meeting. If you are at their door, it is more difficult for the individual to decline a monitoring.
Some families really wanted in-person meetings; they feel zoom is less personal and found it annoying to have to use it again. Families would invite the Monitors to the home, but we had to decline to and use the HIPPA-compliant zoom.
* Some people didn't have technology available. We did overcome this by bringing iPad to people's homes to conduct the surveys. Additionally, individuals receiving a paid service often had staff support to assist them with accessing technology. * It was challenging the first year teaching people how to use Zoom. * Zoom fatigue was a struggle the first year. People were using it for many reasons, school, work, etc., so it was a challenge to get people to agree to be surveyed. This greatly improved the second year. While there were still refusals, we had fewer refusals than the previous year. In fact, only one person refused to participate because they preferred to meet in person. * Nothing can substitute for a face-to-face in-person meeting. There is information that can be gleaned that cannot be using technology. * Not only was there a learning curve for people being surveyed, but for Monitors too. Fortunately, all Monitors in my program had access to technology so that they were able to do surveys, including those with disabilities.
Many individuals, especially older individuals and family members, did not have access to internet, Zoom platform, or webcams. We did offer the use of the agency's tablet and hotspot to be delivered and picked up by us during the interview. Several individuals did use the equipment to complete the interview, but some did not feel comfortable using the equipment even when support was offered.

Also, several individuals and family members needed support before the interview started as they had problems using the Zoom link.
Lack of technology hindered scheduling, refusal of interviews due to virtual platform, several no-shows due to technology.
Not everyone had access to internet or someone to help them with it. Even when driving out with iPads to a remote location, it would be spotty.
The first year was challenging due to many individuals not using the zoom platform, including myself. Getting everyone set up with zoom and training on how it works, then aiding clients on the zoom platform and helping them as well to get acquainted with this. Occasionally losing power or internet connection, but once established, it went pretty smooth

Q50. Please share anything else about virtual interviewing as it relates to people with disabilities as Monitors.
IM4Q Program Coordinator
Training is easier when you are sitting with the person face to face and can help them follow the paperwork, and you can show them where you are at; it is also easier to read the body language of a person you are interviewing face to face that you may miss over the computer.
Monitors shared they were more comfortable as their disabilities were not as apparent over Zoom
When using an IPAD to ask questions, it was sometimes difficult to understand the Monitor, so the second Monitor would have to repeat or clarify the question. The voice inflection is different.
I think in the beginning of Covid and virtual monitoring, individuals were really uncomfortable and didn't want to do anything online. With support, guidance, training, patience, and time, they became more confident and saw that they could do virtual and most enjoyed it.
For many, it was learning a new skill and becoming more versed with virtual opportunities. We saw how the last couple of cycles have affected our Monitors who also became more isolated. We feel having the contact through their work was very important to them. Face-to-face through zoom is also more personal than the phone.
I am excited to be starting from the beginning for the IM4Q 2022-2023 year to be able to include a variety of individuals to work as a team
Our Monitor, who is autistic, had a hard time reading people. He couldn't tell when a person was getting frustrated with the questions.
We found that, for a Monitor with transportation barriers that might come up if seeing folks in person, it was very convenient to be able to join the monitoring team by ZOOM.
Harder for some to pay attention
Many of the Monitors and especially those with disabilities, used this Covid time as a time to learn more about using a computer and virtual ways to connect to others. It was a great learning experience.
We have two individuals with disabilities working in our Local Program. They were able to complete more surveys during the pandemic because they weren't receiving any other services and supports. It gave them something meaningful to do and to receive payment for it. In thinking about how they were trained compared to their co-workers, there really wasn't anything much different. I did participate in more surveys with them to provide them and their partner with coaching. Monitors without disabilities were very supportive and encouraging to their co-workers with disabilities. We also met monthly as a group (virtually) to talk about things that worked and didn't work so that if there were barriers, we could address them immediately. Both Monitors with disabilities gained so many new skills! They both learned how to successfully use technology; they were able to get into Zoom by themselves (after receiving support from staff/family); one Monitor who struggled with reading and writing greatly improved those skills. One of them gained a part-time job with consistent hours (she still works as a Monitor! She loves it!) Overall, communication within our team greatly improved. Monitors needed to learn how to verbally

communicate rather than using non-verbal techniques to complete surveys. They needed to make sure their team member was on the same page, the same question number, etc.
The Monitors with disabilities appear to enjoy using the virtual Zoom platform due to less physical barriers. After training on how to use the Zoom Platform and webcams, they are doing well virtual interviewing.
Monitors didn't have the internet to conduct the surveys or no one to help them. In 2021/2022, we offered to pick up Monitors and bring them to the office to use our equipment, something we weren't doing when the pandemic first hit.
The Monitors could stay safe in their own homes and still participate in the IM4Q survey process, keeping them involved with this and still being able to make some money as well

APPENDIX E: IM4Q Evaluation Survey

Demographic Questions for Everyone		
1	How old are you?	[Select from drop-down list] 18-100
2	What is your gender?	Male Female Other (Please specify) [write in response]
3	Are you Hispanic/Latinx?	Yes No
4	What is your race/ethnicity? (Pick all that apply)	American Indian or Alaska Native Asian (Asian Indian, Chinese, Filipino, Japanese, Korean, Vietnamese, other) Black or African American Pacific Islander (Native Hawaiian, Guamanian, Chamorro, Samoan, other) White Mixed Race Other (Please specify) [write in response]
5	What is the primary IM4Q program you work for?	[Select only one program from drop-down list] [Select only one program from drop-down list] Always On Our Own Advocacy Alliance, The Arc of Indiana, The Arc of Lancaster/Lebanon, The Chatham University IM4Q Program CIL Opportunities Community Voices IM4Q

		Crawford Co Consumer Satisfaction Team Delaware Co Advocacy & Resource Org Grapevine Center IM4Q Program of Montgomery Co IM4Q Program of Chester Co Lawrence Co Community Action Partnership Main Link, The MHA of Fayette Co MHA of Franklin/Fulton Co MHA of Southwestern PA Parent-to-Parent Connections St. Francis University Visions For Equality, Inc. Voice & Vision, Inc.
6	How many years have you been an IM4Q Monitor or Program Coordinator?	[Select from drop-down list] 0-20 I'm not a Monitor or Program Coordinator [send to end]
7	[Screening question that will reroute participants to a specific path of questions next] Pick which best describes you	IM4Q Monitor with a disability IM4Q Monitor who is a family member of someone with a disability IM4Q Monitor who is NOT a person with a disability or a family member of a person with a disability IM4Q Program Coordinator None of the above [send to end]
7a	[for those who selected yes to #7] Would you mind sharing the type of disability you have? [Pick all that apply]	Intellectual or cognitive disability Developmental disability Physical disability Autism or ASD Mental illness or psychiatric diagnosis Deaf or hard of hearing Blind or low vision/vision-related disability Brain injury Learning disability Sensory disability Chronic illness Other
IM4Q Monitor For the following questions, please consider all of the training you had, including the required NCI training and any additional training.		
1	I was trained in how to use Zoom to conduct virtual interviews.	Disagree (not at all trained) Somewhat Disagree (I needed a lot more training)

		Somewhat Agree (I needed a little more training) Agree (completely trained)
2	I was trained on how to support people being interviewed to use Zoom.	Disagree (not at all trained) Somewhat Disagree (I needed a lot more training) Somewhat Agree (I needed a little more training) Agree (completely trained)
3	I was trained on how to create a rapport with people I interview virtually on Zoom.	Disagree (not at all trained) Somewhat Disagree (I needed a lot more training) Somewhat Agree (I needed a little more training) Agree (completely trained)
4	I was trained and/or given advice on how to make a quiet, safe, and private place for virtual interviews.	Disagree (not at all trained) Somewhat Disagree (I needed a lot more training) Somewhat Agree (I needed a little more training) Agree (completely trained)
5	How many hours of training overall (including NCI training) did you get to transition from in-person to virtual interviewing?	[select from drop down] Less than 1 hour 1-2 hours 2-3 hours 3-4 hours 4-5 hours 6-7 hours 7-8 hours 8-9 hours 9-10 hours 10+ hours
6	The AMOUNT of training overall (including NCI training) I got to transition from in-person to virtual interviewing was appropriate.	Disagree [not at all] Somewhat Disagree [needed a lot more] Somewhat Agree [needed a little more] Agree [totally appropriate]
7	I was trained in a way that was accessible to my communication, learning, and/or support needs.	Disagree Somewhat Disagree Somewhat Agree Agree
8	Is there anything you want to add about the training you received for virtual interviewing?	[short response]
9	How confident did you feel conducting Zoom interviews before receiving training for virtual interviewing?	[0-10]
10	How confident did you feel conducting Zoom interviews after receiving training for virtual interviewing?	[0-10]

15	How would you rate the overall experience of switching from in-person to virtual monitoring?	[0-10]
11	I have received an appropriate amount of support regarding issues with virtual interviewing from the Program Coordinator or other IM4Q staff.	Disagree (not at all supported) Somewhat Disagree (I wanted a lot more support) Somewhat Agree (I wanted a little more support) Agree (completely supported) N/A I have not experienced issues or needed additional support
12	I was able to get people involved during virtual interviews the same way I did when I conducted in-person interviews.	Less than before About the same More than before
13	I was able to get the same information from people during virtual interviews as when I conducted in-person interviews.	Less than before About the same More than before
14	How would you rate the overall virtual interviewing experience?	[0-10]
16	What were the benefits or good things about virtual interviewing?	Good things were: [short response] None
17	What were the challenges you experienced with virtual interviewing?	Challenges were: [short response] None
18	Did you need new technology to conduct interviews virtually?	Yes If so, please describe [short response] No
19	Did you need to create/find a new environment to conduct interviews virtually?	Yes If so, please describe [short response] No
20	We want to hear more about your experience with virtual interviews! If you are willing to participate in a brief interview, please give us your email or phone number, and we will contact you with more information. Thank you!	[short response]
Program Coordinator		
1	We trained Monitors on how to use the Zoom platform to conduct virtual interviews.	Disagree (not at all trained) Somewhat Disagree (I wanted to offer a lot more training) Somewhat Agree (I wanted to offer a little more training) Agree (completely trained)
2	We trained Monitors on how to support the person to be interviewed use the Zoom platform.	Disagree (not at all trained) Somewhat Disagree (I wanted to offer a lot more training) Somewhat Agree (I wanted to offer a little more training) Agree (completely trained)
3	We trained Monitors on how to create a rapport with the interviewee on a virtual platform.	Disagree (not at all trained)

		Somewhat Disagree (I wanted to offer a lot more training) Somewhat Agree (I wanted to offer a little more training) Agree (completely trained)
4	We trained Monitors on how to set an appropriate, quiet, safe, private setting for virtual interviews.	Disagree (not at all trained) Somewhat Disagree (I wanted to offer a lot more training) Somewhat Agree (I wanted to offer a little more training) Agree (completely trained)
5	How many hours of additional training (excluding NCI training) did you facilitate to transition Monitors from in-person to virtual interviewing?	[select from drop down] Less than 1 hour 1-2 hours 2-3 hours 3-4 hours 4-5 hours 6-7 hours 7-8 hours 8-9 hours 9-10 hours 10+ hours
6	Did you offer any specific training to Monitors (excluding NCI training) with disabilities that was different from what was offered to non-disabled Monitors?	No Yes
6b	If so, please describe differences in training	[short response]
7	Have you needed to provide any additional training or support to Monitors with disabilities immediately before interviews were conducted?	No Yes
7b	If so, please describe the additional training or support	[short response]
8	Did you offer any specific equipment/environmental adaptations to Monitors with disabilities that were different from what was offered to non-disabled Monitors?	No Yes
8b	If so, please describe differences in equipment/environmental adaptations	[short response]
9	Did you offer any specific ongoing support to Monitors with disabilities with the remote format that was different from what was offered with the in-person monitoring?	No Yes
10	If so, please describe differences in support from virtual to in-person monitoring	[short response]
10b	Please describe how Monitors with disabilities took the NCI pre-online training. (For example, individual or in a group, at home with support, or in the program office)	[short response]
11	Were there Monitors with disabilities who were unable to continue as Monitors because of the switch to remote format?	In 2020-2021, No In 2020-2021, Yes In 2021-2022, No In 2021-2022, Yes
11b	If so, how many Monitors with disabilities left the position due to the switch to remote format?	[Select from drop-down list] In 2022-2021, 0-50

		In 2021-2022, 0-50
12	Did you gain new Monitors with disabilities due to the switch to remote format?	In 2020-2021, No In 2020-2021, Yes In 2021-2022, No In 2021-2022, Yes
12b	If so, how many Monitors with disabilities did you gain due to the switch to remote format?	[Select from drop-down list] In 2022-2021, 0-50 In 2021-2022, 0-50
13	How would you rate the overall experience of switching from in-person to virtual interviewing?	[0-10]
14	What were the benefits or good things about virtual interviewing?	[short response]
15	What were the challenges you experienced with virtual interviewing?	[short response]
16	Please share anything else about virtual interviewing as it relates to people with disabilities as Monitors.	[short response]

APPENDIX F: IM4Q Interview Schedule for Monitors with Disabilities

1. Please describe the training or preparation you got for the remote interview process.
2. How do you feel about the training or preparation you got for the remote interview process? [Additional prompts: Was it enough? Was it helpful? Did it target/meet your needs?]
3. Do you have any recommendations to improve the training or preparation for people with disabilities to do remote interviews?
4. Please describe any support you have received for the remote interview process.
5. How do you feel about the support you have received for the remote interview process? [Additional prompts: Was it enough? Was it helpful? Did it target/meet your needs? Were people available to you when you needed support?]
6. Do you have any recommendations to improve the support for people with disabilities to do remote interviews?
7. How prepared did you feel to do virtual monitoring?
8. Have you experienced any challenges doing virtual monitoring? [Additional prompts: Did it make anything harder?]
9. Have you experienced any successes doing virtual monitoring? [Additional prompts: Did it make anything easier/better?]