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# A Guide for Assessing Older Adults' Needs on Maine Islands

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## **A Guide for Assessing Older Adults' Needs on Maine Islands**

University of Southern Maine

Muskie School of Public Service Final Capstone

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### **Executive Summary**

The populations of Maine's 15 year-round, unbridged islands are aging more rapidly than other parts of the state (Island Institute, 2015). Many of these islands do not have eldercare facilities or services, and aging islanders must choose between receiving care or aging in place on the island. This community needs assessment template was created as a modifiable guide for island community members to assess needs of older adults on islands without eldercare facilities.

Three interviews with island health leaders, one community conversation with older islanders, and one pilot test provided information about what to include in the template. None of the many existing, publicly available community health needs assessment resources met all the needs for an island needs assessment. This template is a unique creation inspired by existing resources, particularly the University of Kansas Community Toolbox (Community Toolbox, 2016), and the needs of Maine islands.

The template includes a demographic survey, guides for conducting semi-structured interviews and group conversations with older adults and caregivers, a guide and worksheet for analyzing the data, a guide for assessing community resources, a guide for dissemination, and a list of additional resources. The template is purposefully non-prescriptive, keeping with island communities' propensities for independence and self-sufficiency. It is also relatively brief, reducing instructions to one page, incorporating health literacy best practices, and promoting autonomy while still providing a structure to complete a thorough needs assessment.

This template may help Maine island communities identify older adults' needs and island resources, in order to allow older adults to age in the island communities.

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## **Background**

Maine has 15 coastal islands that are occupied year-round and not connected to the mainland. The populations of these islands are aging, and most lack elder care services or facilities (Hawley, Miller, Vargas, & Whitley, 2014; Island Institute, 2015). Community members and island health leaders, individuals with varying levels of health professional training and experience (emergency medical technician, nurse, etc.) to whom island community members turn with questions and emergencies on islands without facilities, want to conduct their own elder population community health needs assessments. Islanders want to assess their own community needs without the cost and complication of off-island labor and expertise.

A state wide community health needs assessment was conducted throughout Maine in 2015. It provides a wide variety of information about population health at the state and county levels, although there is no breakdown of information at the island level (SHNAPP, 2015). A few island communities in the United States have conducted needs assessments of their own. Peace Island in Washington State and Mount Desert Island in Maine both conducted needs assessments using components of the Mobilizing for Action through Planning and Partnerships (MAPP) model (Mount Desert Island Hospital & Healthy Acadia, 2016; Phillips, Williams-Gieger, & Carona, 2014). While the MAPP model appears to be extremely helpful for engaging communities, it is a strategic planning model rather than a community health needs assessment framework (NACCHO, 2016).

The Centers for Disease Control and Prevention's (CDC's) website (CDC, 2015; CDC, 2016) lists numerous approaches to conducting community health needs

assessments. These tools vary widely in their primary purpose. Some tools identify existing disparities, some inform needs assessments, and others are used for post-assessment/follow-up evaluations.

In developing the template, no single existing assessment tool is appropriate for the islands as older islanders and those who serve them have varying needs. As such, selection of the most appropriate assessment tools requires identification of the priorities of island elders and the individuals who serve them on the islands.

Coastal island elder health needs assessments will most likely be conducted by community members with varying skill sets. Many may lack familiarity with the processes and concepts of community needs assessment, and none are expected to have generous budgets with which to hire assistance. This dictates some parameters for an appropriate assessment tool:

- Efficient resource use. Volunteers will gather and analyze the information. Tools will facilitate these processes, respecting real-world limitations of community members who may have multiple roles within the community.
- Ease of use. The format of the tool must be clear and useable by any willing volunteer.
- Relevance. The tool needs the flexibility to capture the information that the user community deems important.

The community health needs assessment template presented here is designed to assess the needs of older adults living in unbridged island communities in Maine, and it was created to help identify needs and areas for development to help islanders age in

place. Coastal islands are rural communities, with additional challenges posed by physical separation from the mainland.

Many of these islands have limited resources. An easy-to-use template to determine health and support needs may help improve the lives of older islanders, many who have lived on the islands for most of their lives. Island stakeholders are more likely to use a tool they created, and including their input is a concrete way to ensure their priorities are met. “Aging in Place” initiatives promote older adults remaining in their own homes for as long as possible (Mynatt, Essa, & Rogers, 2000), and providing island communities with this needs assessment resource is one way to help older islanders age at home.

### **Methods**

Completion of the template required a thorough literature search and review of other island communities’ completed health needs assessments and frameworks they used.

Capturing an idea of island priorities and community members’ concerns was critical to success. Stakeholder engagement was the main source of information. Three semi-structured interviews with health leaders on the islands were conducted. Interviewees included one individual each from Cliff Island, Long Island, and an individual who worked with three islands in Penobscot Bay (see Appendix A).

One informal community conversation with older adults and caregivers on Long Island was conducted to learn from islanders their needs, resources, and what to include in the template (see Appendix B). One community conversation on Cliff Island was conducted to pilot test the process for capturing information from islanders themselves.

Health leaders invited individuals to participate in these community conversations. Since island communities are close-knit and aging is a sensitive topic for some individuals, invitations from island health leaders rather than an outside person was most effective for setting up the groups.

Cliff and Long Islands were chosen to contribute to the template because neither have elder care facilities or services, and health leaders on Cliff Island in particular are most interested in the success of this project. The proximity of Cliff and Long Islands to Portland made logistics for interviews and group conversation easier to arrange. Additionally, there were some existing network connections to both islands.

Both the interviews and community conversations informed what these island individuals find important and what they wish to learn from a completed needs assessment.

Island populations in winter and summer months vary drastically. This tool will be most useful for year-round islanders, as they may not have a secondary home on the mainland. Data collection for this template was completed during the winter months. This allowed year-round residents to self-select for community conversations and interviews. Including summer residents was challenging, and in response, the template was designed so it could be repeated for year-round and summer residents.

Information collected from the literature search, semi-structured interviews, and community conversations was combined to form the template. The completed template includes data collection methods and key information illustrative of the primary wishes of the island communities.



The project was determined “Not Research” by the Institutional Review Board at the University of Southern Maine.

## **Discussion**

### **Current Resources**

Creating this template required starting with a blank slate. No existing framework was sufficient to reflect the informational priorities of islanders and the parameters expressed earlier: efficient use of resources, ease of use, and relevance. Some of the community health needs assessment resources that were available vaguely outlined recommendations for conducting a needs assessment, and others provided instruction manuals that included hundreds of pages. Some also assumed that the reader had previous public health or community planning experience. The framework that most closely fit island communities’ criteria, and the framework on which this template is loosely based, is from the Community Tool Box (Community Tool Box, 2016).

The Community Tool Box provides in-depth resources and tools for all aspects of community development. It also includes an outline for assessing needs in a community. The recommendations to communities are to engage stakeholders, identify their challenges and resources, and to choose a topic to address as a group. These recommendations are in line with conducting a needs assessment, yet the instructions for each step are long and text-heavy (Community Tool Box, 2016). The information within the Tool Box is relevant for the islands, yet the format is not.

### **Island Priorities**

The template (see Appendix C) includes a demographic survey for older adults, semi-structured interview guides for both older adults and caregivers, a group

conversation guide similar to a focus group, guidance for data analysis, a resource assessment guide, and a dissemination guide. Following the ‘ease of use’ parameter, the template molded into a guide (rather than a prescriptive tool) with basic instructions and best practices for conducting each component of the needs assessment. The language of the instructions reiterates that it is a guide which can be modified or used “as is” per the island’s needs. For efficiency, the overall guide has a three-page instruction sheet briefly outlining the purpose of each component, and each component has a maximum one-page instruction sheet with more detailed information. Striking the right balance included making sure there was enough information to guide community leaders through the needs assessment process without being overly lengthy and text heavy. Too much information would be overwhelming, and too little information would be of limited assistance.

Interviews with health leaders provided context for what to include in the template and what kind of information it should attempt to draw from the community. Particularly, health leaders wanted a way to collect information about challenges older adults face and how to marry the island’s current resources with those needs. As a result, a resource analysis guide was included in the template. The health leaders also indicated that no demographic data is collected about the island, and that islanders are generally open to filling out surveys. To meet this need, a demographic survey was created based on US Census information, feedback from older islanders, and a survey used by an island health leader in the past (C. Crowley, personal communication, February 10, 2017; Gates, 2015; US Census Bureau, 2015).

Semi-structured interview guides were also included based on information from health leaders. Aging and caregiving are sensitive topics to some people who may not

feel comfortable speaking about these topics in front of others. Semi-structured interviews can elicit detailed information from people without compromising their privacy. An informed consent sheet was also included based on health leader information to further assure interviewees of confidence (M. Gates, personal communication, February 9, 2017).

The community conversation with older islanders on Long Island revealed that they are open to participation in an assessment. Although island communities are close-knit, it was surprising to learn that older islanders and caregivers did not talk among themselves about their experiences of aging and caregiving on the island. This community conversation was the first time they sat down and shared their experiences in detail. They indicated that it was helpful and a relief to discuss their concerns and experiences. They recommended including a similar opportunity in the needs assessment and using the survey as a gateway to ask older islanders if they would be willing to participate in one-on-one interviews or group conversations in the future.

### **Template Development**

For the purposes of a template for the islands, a tool that could be used as a detailed guide was most appropriate since an islander with any level of skill and experience could conduct the assessment. A lengthy set of instructions is unlikely to be welcomed. In addition, the template is modifiable for each island community. The language of the instructions and guides attempts to convey a sense of malleability. The section titles reflect this; the term ‘guide’ seemed less concrete and more flexible than ‘tool,’ which was used in early iterations of the template.

Considering this, instructions for each tool within the template were kept to one page maximum. Islanders conducting the assessment may not have extra time to read many pages. The tool is meant to guide thinking; it is not an exhaustive step by step restrictive manual. The following section provides a brief explanation of the nine components of this template (see Appendix C). These include:

1. Demographic Survey
2. Interview Consent Form
3. Modifiable Semi-Structured Interview Guide for Older Adults to reveal most common concerns
4. Modifiable Semi-Structured Interview Guide for Caregivers to reveal most common needs
5. Modifiable Group Conversation Guide with older adults and caregivers
6. Interview and Group Conversation Analysis Guide and Worksheet
7. Resource Assessment Guide to assess resources with relation to needs and priorities
8. Dissemination Guide
9. List of Additional Resources

The first component of the template is a demographic survey. It was included in the template following interviews with health leaders; some islands do not currently collect demographic data. This survey was modeled after US Census data, the community conversations with older islanders, and interviews with the island health leaders. The survey may be helpful for island communities to get a snapshot of the characteristics of their older adult populations. It can also be used as an introduction for older islanders to participate in interviews or group conversations.

The second, third, and fourth components are an interview consent form and semi-structured interview guides for older adults and caregivers. They were included to

thoroughly capture aging on the islands from the perspective of older adults and caregivers. The interview consent form was included on the recommendation of an islander who conducted needs assessments in the past. It is meant as a measure to reiterate confidentiality between the interviewer and the interviewee, and helps make the person being interviewed more comfortable to share their personal experiences since the questions touch on sensitive topics. The questions in the guides are open-ended, asking about challenges, resources, and services. They are phrased so the interviewees can respond without identifying their personal experiences, such as, “What are some challenges of aging on the island that you *or others* face?” The questions may be modified to elicit information about specific topics or asked “as is.”

The fifth component, a group conversation guide, was not included in the first iteration of the template because some individuals may feel uncomfortable discussing sensitive information in a group setting. However, individuals in the community conversation indicated that they liked the group setting, and it was the first time they had come together to discuss challenges involving caregiving and aging on the island. They recommended it be part of the needs assessment. As a result, this guidance for a community conversation has been included as an optional component of the template.

The sixth component is a one page outline describing data analysis after conducting the interviews and community conversations. A brief summary of qualitative data analysis techniques and some structured questions are intended to help assessors derive major themes and priorities from the data (Dawson, Manderson, & Tallo, 1993; Wholey, Hatry, & Newcomer, 2010). A worksheet to compare older adults’ and caregivers’ views is also included to help organize the analysis.

The seventh component is a guide for identifying community resources. The community health needs assessment resources recommend considering the community's resources to meet the needs uncovered in the assessment. This is a crucial step to helping communities meet needs, but the assessment resources do not provide instructions on how to actually do this. This template has a one page guide to help identify resources and includes some structured questions to help assessors think about what resources their community has to offer.

The eighth component, a dissemination guide, is different from a dissemination plan. Specifics of what to do with the information from the needs assessment are left up to the assessors who have a better idea of the community and how best to share it. The guide provides some ideas about what may work for the community, as well as some guiding questions that should assist the assessors to make the most impact using the information from the community.

The ninth component, a list of additional resources, was included for extra guidance in the instance that someone wanted more in-depth information about a specific component of the needs assessment.

Health literacy best practices emerged as a surprising necessity for the template. These contributed to another requirement set out at the beginning of the project: ease of use. Easy to read instructions, structured thinking guides, and short sections help make the template manageable and easy to digest. The best practices included in the template are: instructions written in plain language, use of white space, sans serif font for easy reading, use of bullets and text boxes to identify most important points, and a color scheme that also prints in grey scale (Osborne, 2013).

### **Limitations, Challenges, and Lessons Learned**

Interviewing the proposed four health leaders was challenging. Although there were existing island network connections, islanders are, in general, a self-sufficient group and often choose to work among themselves or with other islands, instead of groups from the mainland. Three interviews were successfully completed, though an interview with a fourth health leader was unattainable.

The pilot test with older adults and caregivers on Cliff Island highlighted the dynamics of islands. Islands are small communities, and often residents know one another. After asking the first question, *Think back to a time when living out here was challenging related to getting older. What were some benefits?*, the conversation directed itself, and islanders were very forthcoming with benefits, challenges, and resources to address the challenges. It seemed that because participants all knew one another and island life, they only needed a conversation starter rather than structured questions; they were ready to talk about on-island aging. If the conversation were moderated by a fellow islander instead of an outside mainlander, participants may have been more receptive to the set of questions. While the true pilot test of the group conversation guide did not occur, this discussion demonstrated that the same information could be obtained in a much more fluid and relaxed conversation.

This pilot test also highlighted how different the island communities are from one another. The community conversation on Long Island required a structured question outline to guide the conversation, while Cliff Island only needed one question to start. The group conversation guide will remain in the template for islands to use if needed or as an outline for a flexible conversation like the experience on Cliff Island.

This template was created based on input from year-round Maine island residents during the winter months. While designed with modification in mind, the template may not be as accommodating for needs of summer island residents who may have different challenges and resources. When using the template during the summer months, it may be necessary to be mindful of population characteristics and make appropriate changes. If using this template for islands outside of Maine, additional changes may be necessary since this template is based on the experience and needs of Maine islands.

Creating a template from scratch was also challenging. Wide variation among needs assessment resources was both positive and negative. On one hand, the variation provided examples of many different approaches and demonstrated that there were few restrictions to the island template. On the other, such variation provided little structure, essentially forcing creation of a new outline and working from there.

### **Conclusion**

This template will be a useful guide to help island communities without eldercare facilities identify challenges, barriers, and opportunities for older islanders and caregivers. Components of the template may be used together or independently, and the questions and language of each component may be modified or omitted at the assessors' discretion. Conducting a needs assessment with this template requires minimal resources and can be completed on-island without an external assessor. Next steps for this work are to begin the needs assessment process on Maine islands, and to use the results in order to better meet the needs of older islanders. The template may help ensure that older adults receive the care and resources that they may need, and to contribute in helping older



islanders age in place, thereby increasing their quality of life and sustainability of the island.

### **Audiences**

Community leaders and members of Maine islands without elder care facilities may be interested in this project since as the populations on the islands age, a method for community members to assess their needs without involving an external assessor will be invaluable. As a result of this template, challenges, barriers, and opportunities for elder islanders may be identified and alleviated more quickly because it can be conducted on-island and by island community members. Since one of the biggest challenges for islanders is their physical separation from mainland services, the template informed needs assessment may be helpful in ensuring that older adults receive the care and resources they may not get otherwise.

Members of Maine islands that do have elder care facilities may also find this template helpful because they may be able to adapt it to the unique needs of their elder islanders. For instance, there may be residents on the island who are not yet ready to move into a facility and who face barriers and challenges. This template may provide assistance for islands with elder care facilities to evaluate the needs of those individuals.

Other island communities throughout the United States may find this template helpful with regard to their own elder challenges. The template is to be designed in such a way that each island can modify it to fit specific informational needs. For now, this template is a step forward; however, as community needs assessment expertise develops nationally, it will be valuable for Maine islands to share their experience, and learn from other unbridged islands throughout the United States.

**Dissemination**

This template will be sent to the Maine Seacoast Mission, the Island Institute, health leaders on Cliff and Long Islands, and any other islands per request after the final presentation in April, 2017. The University Of Southern Maine Muskie School Of Public Service will also receive a copy of the final product, and it will be published in the USM Library's Digital Commons.

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## Appendix A

**Interview Questions for Cliff and Long Island Health Leaders**

1. As a health leader on \_\_\_\_\_ Island, have you ever conducted an assessment of the needs of older islanders here?
  - a. If yes, could you tell me what you did?
  - b. If no, do you know of anyone else who has conducted such an assessment? Who?
2. Are demographic data about the island collected?
3. As a health leader on \_\_\_\_\_ Island, what concerns do you have with regard to the health of older adults?
  - a. *Probe: What are the most frequent health challenges faced by older adults?*
4. Do you collect information about older islanders' health and/or social support needs?
5. What do you usually do with that information?
6. What are the most common requests for assistance that you hear from older islanders?
7. Among these, what would you say are older islanders' priorities?
  - a. *Probe: Are the priorities of older islanders related to things like health, social needs, physical things like heat or staying on the island, or other things?*
8. What are the most common requests for assistance for older adults that you hear from their family and neighbors?
9. Among these, what would you say are family and neighbors' priorities?
10. As a health leader, do you have the same or different priorities
  - a. As the older islanders themselves?
  - b. As family and neighbors?
11. What information would be most helpful to you and other islanders who are trying to meet these priorities?
  - a. *Probe: Are there any aspects of older adults' needs and circumstances, or island population characteristics that would be helpful for you to know?*
12. Would it be helpful to see if there are any other priorities that may not be apparent?
  - a. *Probe: Do you think there are priorities for older adults that are present but not talked about? Might there be an undercurrent that has not been identified or brought to the surface?*
13. What would you say is the best way to communicate with older islanders about their needs?
  - a. *Probe: Do islanders prefer to talk about these sorts of issues privately, at a community dinner, anonymously through a paper survey, or another way?*
14. Would you ever consider conducting an on-island assessment of older adults' needs?
  - a. If yes, what features would you want to see included in a template designed to guide islanders' self- assessment of needs?

**Interview Questions for Penobscot Bay Health Leader**

1. Would you mind telling me about the community needs assessment you conducted on North Haven?
2. What information did you want to learn from your assessment?
  - a. *Probe: Was your needs assessment focused on community health, older adults, health and social needs, etc?*
3. Was it helpful to get the information you wanted?
  - a. Could you tell me what you learned that was most helpful?
  - b. I am interested in whom you talked with and what you learned from them. Can you tell me about that?
  - c. Would you mind sharing a copy of the assessment with me?
4. Thinking about your experience in doing the assessment, what do you think you would do differently if you knew what you know now?
5. I am creating a health needs assessment template for the islands that anyone can use to conduct their own needs assessment for older adults.
  - a. When you did your assessment, did you consider using a model or framework like some I have found online?
    - i. *The CDC's website has a lot of different tools for doing needs assessments, mostly to help non-profit hospitals conduct them since they are required to do it every 3 years because of the Affordable Care Act/ Obamacare. Some of these are different toolkits with surveys that can be sent out into the community and others are ways to engage stakeholders and get the whole community involved.*
  - b. In your opinion, is the framework you used a good choice for what I am trying to create?
    - i. *Probe: Would you recommend the framework you used as a model for the template?*
6. My goal is to make this template mostly for the islands without elder care facilities, since their older adults are most at risk for moving off-island. Can you tell me about your experiences with those islands?
  - a. *Probe: Do you have any sense about what their priorities are and what would be most helpful for them?*
7. What would you suggest to the other islands without elder care services, based on your experiences with North Haven and Vinalhaven?
  - a. *Probe: What information could the assessment uncover about older islanders that would be most useful?*

## Appendix B

**Long Island Community Conversation Questions**

1. Think back to a time when living out here was especially challenging with regard to getting older for you or another older islander you know. What was that like?
  - a. *Probe: What was going on? What could have helped? What did help?*
2. What were some particular challenges you or your neighbor faced?
  - a. Do you or others still have those challenges or are they different?
3. Among these challenges, what are the most important?
  - a. *Probe: Which challenges were the most difficult to manage, had the most impact on you or your neighbor, or affected the most people?*
4. In what ways would those challenges have been different for you or your neighbor if someone knew about them?
  - a. *Probe: In what ways would the challenges have been easier to face? In what ways would the challenges have been more difficult to face?*
  - b. *Probe: If someone else on the island knew about your or your neighbors' challenges, would dealing with those challenges have been easier or more difficult? How?*
5. If you or someone you know has family members on the island, do they have different concerns for you or other older adults that you know of?
  - a. If yes, what are they?
  - b. Among these, what do you think the most important are to them?
6. Are there any things off island or on a different island that would be helpful to meet your island's needs?
  - a. *Probe: Do you wish you had more information about something on a different island that you think would be helpful for your island?*
7. Has anyone ever talked with you about your or your neighbors' biggest challenges living here?
  - a. If yes, what happened with that information?
  - b. If no, how would you feel if someone did? Would it be helpful?
8. What information would be helpful for someone to know in order to meet these concerns and challenges that we've been talking about?
  - a. *Probe: Are there any aspects of your or your neighbors' needs and circumstances, or island population characteristics that would be helpful to know?*
9. What is the best way to talk with you or your neighbors?
  - a. *Probe: Do you prefer to talk about these sorts of issues privately, at the community dinner, anonymously through a paper survey, or another way?*
10. Would you ever consider participating in an island assessment of your or other older islanders' needs?
  - a. If yes, what features would you want to see included in the assessment?
    - i. *Probe: Would you prefer the assessment to be done in a certain way, like through a survey, someone talking with you one-on-one, or another way?*
  - b. If no, can you talk about what you would like to see instead?
11. Do you have any other advice for me as I make this tool?

## Appendix C

## A Guide for Assessing Older Adults' Needs on Maine Islands

### Instructions: Read this first

This needs assessment template is a modifiable guide for Maine islands. It is meant to assess needs and resources of older adults on islands without elder care facilities to identify areas for development to help islanders age in place. It was made based on the input from members of Maine islands.

It can be used as a guide to think about and ask older islanders and caregivers about their needs, challenges, priorities, and resources. You can use some or all parts of this template, parts from each section, or modify the questions and format for your community needs.

This template is divided into sections with information about each step of conducting a community health needs assessment. Island community members doing the assessment can go through the template step-by-step or use the sections that work best for them. For example, one part may be used to identify needs, and other parts for focused follow-up of other areas.

Before you begin, create a small community work team. It can help organize what needs to be done, conduct the assessment, and go through the information afterwards. This can be a small group of people who are interested in helping islanders age in place. It is a good idea to read through the template to learn about the process before beginning the assessment.

### Included in this guide:

1. A **Demographic Survey**
2. An **Interview Consent Form**
3. A modifiable **Semi-Structured Interview Guide for Older Adults** to reveal most common concerns
4. A modifiable **Semi-Structured Interview Guide for Caregivers** to reveal most common needs
5. A modifiable **Group Conversation Guide** with older adults and caregivers
6. An **Interview and Group Conversation Analysis Guide and Worksheet**
7. A **Resource Assessment Guide** to assess resources with relation to needs and priorities
8. A **Dissemination Guide**
9. A list of **Additional Resources**



### 1. Demographic Survey

The demographic survey is designed to collect data about the older adult population on the islands. Some islands do not collect this information, and doing so may be helpful to get an idea of the older adult populations there.

There are also some questions asking about challenges of living on the island. This survey can be given out first, and then used as a way for islanders to talk about their experiences in one-on-one interviews or in a group conversation.

The survey is designed to be completed by older adults anonymously, unless they choose to include their name. Giving it out, getting it back, and going through completed surveys is up to the team conducting the assessment. A recommendation for going through completed surveys is to enter them into a software program like Microsoft Excel, Survey Monkey, or Google Forms which can create charts to show the distribution of results.

### 2. Interview Consent Form

This consent form is optional. It is meant to assure the interviewees that the information they share will not be made public, and their names will not be associated with anything unless they choose. It may be used as-is, with the wording changed, or not used at all.

### 3. Semi-Structured Interview Guide: Older Adults

This guide is an outline of questions to ask older islanders one-on-one about challenges, needs, and resource problems they or their peers face living on the island. The questions are phrased so individuals can answer without identifying that they personally have these challenges.

### 4. Semi-Structured Interview Guide: Caregivers

This guide is an outline of questions to ask caregivers of older adults on the islands one-on-one. The questions are similar to the questions asked of older adults, but interviewing caregivers separately may help identify gaps and differences between what older adults think and what others see.

### 5. Group Conversation Guide

This guide is similar to the semi-structured interviews, but is meant for a group discussion about aging on the island. Group conversations can help people talk among themselves about things they may not have thought of on their own. The questions help focus the conversation on a specific topic, and the leader often becomes an outside viewer listening to the participants' experiences and opinions.

### 6. Interview Analysis Guide and Worksheet

Now that you have talked with older adults and caregivers, this tool is a guide to help you think about and analyze all the information you have gathered. You can fill in the worksheet with themes from each interview and group conversation. Ideas that occur more than once may be priorities for the island.

### 7. Resource Assessment Guide

This guide can help provide a structure for group brainstorming about what resources are currently available on the island. This step is critical for thinking about unused resources that may already exist on the island and can be used to meet current needs and challenges.

Use the completed analysis worksheet to brainstorm with other community members about what resources already exist on the island that can be used to meet the priorities.

### 8. Dissemination Guide

Now that you know the needs and resources of older adults on the island, what do you do next? Sharing the information with the community and other islands is a good place to start. That way, the community knows what the challenges are and can work to address some of them. Also, the community can look back later and see what has changed and where there are still places that can be improved.

The needs assessment process can take anywhere from 6 to 12 months to complete from beginning to end.

## Demographic Survey

Select ONE answer for each question that best applies to you.

1. What is your gender?
  - Male
  - Female
  - Non-binary/ third gender
  - Prefer to self-describe: \_\_\_\_\_
2. What is your age?
  - Younger than 45 years
  - 45-54 years
  - 55-59 years
  - 60-64 years
  - 65-74 years
  - 75-84 years
  - 85 years and older
3. What is your race?
  - White
  - Black or African American
  - American Indian and Alaska Native
  - Asian
  - Native Hawaiian and other Pacific Islander
  - Hispanic or Latino
  - Two or more races
  - Some other race: \_\_\_\_\_
  - Prefer not to answer
4. Over the last calendar year, about how many months did you live on the island (NOT including vacations or short stays off-island)?
  - 2 months or less
  - 3-5 months
  - 6-9 months
  - 10-12 months
5. What is your marital status?
  - Married
  - Single, never married
  - Separated
  - Widowed
  - Divorced
  - In a domestic partnership
6. What is your current living situation?
  - Alone
  - With spouse/partner
  - With other relative
  - With other non-relative
  - Other: \_\_\_\_\_
7. Does someone help you with regular, everyday tasks, like cooking, cleaning, managing medicines, going to appointments, or other things? (If NO, skip to Question 9. If YES, continue to Question 8).
  - No
  - Yes
8. If yes, who?
  - Spouse/Partner
  - Other relative
  - Non-relative
  - Other: \_\_\_\_\_
9. Do you help someone else with regular, everyday tasks, like cooking, cleaning, managing medicines, going to appointments, or other things? (If NO, skip to Question 11. If YES, continue to Question 10).
  - No
  - Yes

10. If yes, who?

- Spouse/Partner
- Other relative
- Non-relative
- Other: \_\_\_\_\_

11. How would you define your health?

- Excellent
- Very Good
- Good
- Fair
- Poor

12. What is your employment status as of last week?

- Employed full-time
- Employed part-time
- Not employed, looking for work
- Retired
- Disabled, not able to work

13. What is your highest level of education?

- Less than high school, no diploma
- High school graduate or equivalent
- Some college, no degree
- Associate's degree (2 year degree)
- Bachelor's degree (4 year degree)
- Graduate or professional degree

14. What was your household's annual income last year?

- Less than \$10,000
- \$10,000-\$14,999
- \$15,000-\$24,999
- \$25,000-\$34,999
- \$35,000-\$49,999
- \$50,000-\$74,999
- \$75,000-\$99,999
- \$100,000-\$149,999
- \$150,000 and up
- Prefer not to answer

15. Do you have any health issues that require frequent trips to town?

- No
- Yes

16. Do you have any concerns about living on the island as you get older?

- No
- Yes; please briefly explain

\_\_\_\_\_

\_\_\_\_\_

17. Would you consider providing more information about aging on the island?

- No
- Maybe
- Yes, in a one-on-one interview
- Yes, in a small group conversation with other islanders

18. If maybe or yes, may we contact you?

Name: \_\_\_\_\_

Phone number: \_\_\_\_\_

## Semi-Structured Interviews: What do islanders think?

Interviewing older adults and caregivers one-on-one is a good way to get accurate information about aging on the island. Individual interviews take more time than surveys or group conversations, but the results are more thorough. Capturing complicated ideas in surveys is challenging, and the response rate is often not very high. Group conversations are good for talking to many people at once, but can be difficult when discussing sensitive topics. People may be less likely to talk about their personal challenges in front of peers than in conversations between two people kept in private.

Recruiting people to interview is the next step. You can ask as many or as few people as you choose. The more people you interview, the wider your information, and the more likely you are to get a true view of aging on the island. However, the more people you interview, the more resources will be needed (time, interviewers, etc.).

Interviewing a wide range of older adults and caregivers will also help you get a good picture. Try interviewing older adults who are actively involved with island aging as well as people who are less outgoing. That way you get a lot of viewpoints, which are key to rich information.

The following guides can be used during the interviews. They are suggestions for the types of questions to ask. They can be used as-is, edited, or used as an outline for creating your own questions. Before you begin each interview, it is a good idea to go over the consent form with the person you are interviewing so they know what will happen with the information you talk about. You should take notes, record sound only, or do both during the interviews. You want to capture what people say accurately, and sometimes recording is the best way to do that so you can go back later. What you choose to do is up to you and the person you interview.

Before you begin interviewing, consider:

- What are islanders currently talking about?
- What are the main questions we have for older adults and caregivers on the island?
- What do we want to know about our older adults?
- What do we want to know about aging on the island?

This gives some background and makes getting and studying the information you want easier.

Lastly, it is easy to get off-topic during interviews and you may run out of time before asking all of your questions. Figure out which questions are the most important to ask and skip over less important ones if you start running out of time so you get the information you want.

**Interview Consent Form**

I, \_\_\_\_\_, agree to be interviewed for the \_\_\_\_\_ community health needs assessment.

The information I share today will be used to help identify and address the needs of older adults on \_\_\_\_\_.

The information I share today will remain anonymous unless I give explicit permission for my name to be used.

I understand that (the interview will be audio recorded and) hand-written notes will be taken during the interview. (The audio recording will be destroyed after the project is over).

Notes and this form will be kept in a place where only people conducting the interviews have access to keep my identity confidential.

Interviewers answered all my questions before asking me to sign this form.

\_\_\_\_\_  
Participant's Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Participant's Signature

## Older Adult Semi-Structured Interview Guide

1. How long have you lived on the island?
2. Do you live here year-round?
  - a. *If no*, How many months out of the year do you live here?
3. Would you ever consider moving off island? Why or why not?
  - a. *Probe: Would you ever consider moving off island if continuing to live here becomes too difficult?*
4. What are some benefits about aging on the island to you or other older islanders?
  - a. *Probe: What are some good things about getting older on the island?*
5. What are some challenges of aging on the island that you or others face?
  - a. *Probe: Are there any specific problems you or others have that may affect your ability to stay on the island?*
6. What kinds of health services do you or others use?
  - a. *Probe: What types of medical services do you use? Do you use any other services on the island or in town, like nurses coming to your home?*
7. What are some good things about those services?
  - a. *Probe: What parts of those services do you like?*
8. What are bad things about those services?
  - a. *Probe: What are some things you don't like?*
  - b. *Probe: Is there anything about these services you wish were different?*
9. What kinds of services do you wish you had but don't have now?
  - a. *Probe: Is there anything in town or on another island that you would like to see here?*
10. Do you notice a difference in services based on the season?
  - a. *Probe: Are some services you use different in summer versus winter?*
11. Has anyone on the island ever helped you or others with regular, everyday things?
  - a. *Probe: Things like getting rides to appointments or the boat, people who cook meals for you or make sure you take the right medicines.*
  - b. *If yes*, what kind of help? Who helps you?
12. Do you help others?
  - a. *If yes*, what do you help them with?
  - b. Do you have concerns for them that are different than concerns they have for themselves?
13. Is there something about aging on the island that you wish were different? What is it?
14. Is there anything else that you would like to tell me about aging on the island?

## Caregiver Semi-Structured Interview Guide

1. How long have you lived on the island?
2. Do you live here year-round?
  - a. *If no*, How many months out of the year do you live here?
3. Would you consider moving off-island? Why or why not?
  - a. *Probe: Would you consider moving off island if continuing to live here becomes too difficult?*
4. Would the person you care for consider moving off-island? Why or why not?
  - a. *Probe: Would the person you care for consider moving off island if continuing to live here becomes too difficult?*
5. What are some benefits on the island to you as a caregiver?
  - a. *Probe: What are some good things for you as a caregiver?*
6. What are some benefits on the island that you see for older islanders?
  - a. *Probe: What are some good things for older islanders?*
7. What are some challenges that you have as a caregiver on the island?
  - a. *Probe: Are there any specific problems that you as a caregiver face?*
8. What are some challenges that you see for older islanders?
  - a. *Probe: Are there any specific problems that you see for older islanders?*
9. How do you feel about respite care on the island?
  - a. *Probe: What are some things you like about respite care?*
  - b. *Probe: What are some things that could make it better?*
10. What kinds of health services do you come into contact with as a caregiver?
  - a. *Probe: What in-town or on island services do you deal with as a caregiver?*
11. What are some good things about those services?
  - a. *Probe: What are some good things about those services?*
12. What are some bad things about those services?
  - a. *Probe: What are some bad things about those services?*
  - b. *Probe: Is there anything you wish were different?*
13. What kinds of services do you wish you had but do not have now?
  - a. *Probe: Is there anything in town or on another island that you would like to see here to help either you or the person you care for?*
14. Do you notice a difference in services based on the season?
15. Do you or other older adults get help from others?
  - a. *If yes*, what kind of help? Who helps you?
16. Is there something about caring for older islanders that you wish were different?
17. Is there something about aging on the island in general that you wish were different?
18. Is there anything else that you would like to tell me about being a caregiver on this island?



## Group Conversations: Again, what do islanders think?

Group conversations are like semi-structured interviews, except they are focused conversations among groups of people (sometimes called focus groups). They can help people think of ideas they may not have thought of on their own.

Group conversations are optional for the needs assessment. The number of conversations you have may depend on your resources and how many people are willing to join. If you have more than one group discussion, you have learned everything when you stop hearing anything new and the same ideas are repeated in different groups.

You can have groups of only older adults, only caregivers, or groups with both. Your results may be different based on who is in the group. For example, some caregivers may not be comfortable being honest about caring for an older relative if that person is in the room.

Invite a group of between 3-10 people with different experiences of aging on the island to participate so you get different opinions. The questions should get people talking among themselves. Your results are good when you can listen and be an outside observer of the conversation. The conversation should last between 1 to 2 hours. Take a break in the middle for snacks and drinks. Like the interviews, you should take notes, audio record, or do both during the discussion to capture the information accurately. Recording is good so you can go back to the discussion.

A neutral setting, like a community room, is a good place to hold a group conversation. If everyone in your group is comfortable with each other, it is okay to hold it in someone's home.

Before you have a group conversation, consider:

- What do you want to learn?
- Is talking in a group reasonable, or is there another way to get the information?
- Who has experience or opinions about what you want to learn?
- Do you think they will be comfortable talking about this in front of others?

The following group conversation guide has questions and probe questions. The probes are to ask if the group needs some encouragement to answer. You can modify the questions; it is best to have open-ended questions. You do not want to ask closed-ended “yes” or “no” questions because you want people to tell you their opinions.

At the end of the group conversation, discuss it with your team and go over your notes. Expand your notes as much as possible; this will help get good information and make analysis easier.

## Group Conversation Guide

*Begin the conversation with an introduction. Thank everyone for coming and briefly explain the purpose of the project.*

If at any point you need to step out, feel free to come and go as you wish. Our conversation today will last about (an hour, an hour and a half, etc.)

You do not have to answer every question if you don't want to.

We ask that you not repeat others' comments you hear today to respect everyone's confidentiality.

Please respect each other's contributions. There are no right or wrong answers, and we all have different experiences.

We will be taking notes throughout our conversation to make sure we can capture everything accurately.

Does anyone have any questions before we begin?

### **TOTAL TIME: 70 MINS**

#### Introductions (5 mins)

1. Let's begin by going around and introducing ourselves and saying how long we've lived on the island.

#### Resources and Services (35 mins)

1. Think back to a time when living on the island was especially challenging related to getting older. What was that like? (5 mins)
  - a. *Probe: What was going on? What could have helped? What did help?*
2. What were some benefits about aging on the island to you or other older islanders? (5 mins)
  - a. *Probe: What were some good things about getting older on the island?*
3. What kinds of health services do you use? (5 mins)
  - a. *Probe: What in-town or on island services do you use?*
4. What are some good things about those services? (5 mins)
  - a. *Probe: What do you like about those services?*
5. What are some bad things about those services? (5 mins)

- a. *Probe: What don't you like about those services?*
- b. *Probe: Is there anything about these services you wish were different?*
6. Is there a difference in services based on the season? What do you think about that? (5 mins)
  - a. *Probe: Are some services you use different in summer versus winter?*
7. Are there any things off island or on a different island that would be helpful for your island's needs? (5 mins)
  - a. *Probe: Do you wish you had more information about something in town or on a different island that you think would be helpful for your island?*

#### Challenges (20 mins)

8. Think back to that same time or a different time when living out here was difficult. What were some particular challenges you or your neighbor faced? (5 mins)
  - a. Do you or others still have those challenges or are they different?
9. Among these challenges, what are the most important? (5 mins)
  - a. *Probe: Which challenges were the most difficult to manage, had the most impact on you or your neighbor, or affected the most people?*
10. In what ways would those challenges have been different for you or your neighbor if someone knew about them? (5 mins)
  - b. *Probe: In what ways would the challenges have been easier to face? In what ways would the challenges have been more difficult to face?*
  - c. *Probe: If someone else on the island knew about your or your neighbors' challenges, would dealing with those challenges have been easier or more difficult? How?*
11. If you or someone you know has family members on the island, do they have different concerns for you or other older adults that you know of? If you are a caregiver, do you have different concerns for the person you care for than they do? (5 mins)
  - d. If yes, what are they?
  - e. Among these, what do you think the most important are to them?

#### Final Comments (10 mins)

12. Is there something about aging on the island that you wish were different? What is it? (5 mins)
13. Do you have any more to add about what it's like to age on the island? (5 mins)

## Interview and Group Conversation Analysis: What can we learn from this data?

Once you begin talking with people, study your data as you collect it. Studying your data as you collect it, instead of once at the end, helps you get an idea of what the information means and can help you ask more targeted questions in future interviews. Whoever conducted the interviews and group conversations should analyze the data so the information is interpreted in context.

Go through your notes from each interview and group conversation and pick out themes. One way to do this is re-read your notes and put anything important into categories, in the margins with pen and paper. You may end up with dozens of small categories. Re-read the notes with your categories in mind. Begin to group those smaller categories into larger ones. Repeat until you have 8-10 main themes.

During analysis, ask yourself:

- Are there differences in what respondents said? Are there similarities?
- What are some gaps between what older adults and caregivers think?
- What challenges did respondents talk about?
- What are the most important aspects of aging on the islands to them?
- What are the least important?
- What, if anything, is missing?
- What are barriers for older adults and/or caregivers?

Now, your final categories/major themes should tell you what older adults and caregivers think about aging on the islands. You can use the “Analysis Worksheet” on the next page to keep track of themes and compare them side by side.

Once you have completed all data collection, go through your notes again to see what, if any, themes appear more than once.

Now that you have identified older adults’ and caregivers’ ideas and experiences, try and see which are the most important. Often, topics that appear more than once are most important. These may be the priorities to focus on.

Use the priorities you identified to create a goal or a vision that addresses them. This goal is now your guide for meeting the need, and is tied closely with assessing what resources you have on the island.

**Analysis Worksheet**

You can use this worksheet to help organize your data. Write the major themes you identified from interviews and group conversations under the appropriate column. It can help show you differences or similarities across each group’s experiences and opinions. You can return to this quickly during your resource assessment to make matching resources easier.

Older Adults Themes	Caregiver Themes	Group Conversation Themes	Notes

## Resource Assessment Guide: What does the community already have?

After you have analyzed the interviews and group conversations, you will have a good idea what the priorities are for aging on your island. You may also have taken the extra step to create a goal or vision for the island community based on these priorities.

Gather a group of people to consider the priorities and island resources that can be used to meet these needs. This group may be the same people from your group conversation. You may even do this brainstorming during the group conversation. Sometimes talking about challenges helps people come up with ideas for solutions.

The best way to assess resources to talk about each need and use your combined knowledge of the island to think of ways to address them. That way, you may not have to use extra resources to meet the needs. Some island assets you may consider are community members, organizations, and existing network connections.

### To assess resources, consider:

- What are older adults' and caregivers' priorities for aging on the island?
- What are some things your island community has access to that relates to some of these priorities?
- What were the benefits that older adults and caregivers talked about during the interviews?
- What resources does your island have that other islands want?
- What resources does another island or the mainland have that would help the islanders here?
- How would those resources work here?
- What does your network look like? Are you or someone in the community connected with people or organizations that have resources or influence on the island or in town?
- How can your network connections help with the challenges older islanders identified?
- How can you use your existing resources to meet your goal?

## Dissemination: Now What?

You know what the most important challenges are, what resources the island has, and what it could use to meet the needs; now what do you do?

Tell everyone. Let people on the island know what you have done, your findings, and what you plan to do about it. Tell them at town hall meetings, community dinners, church gatherings, etc. It is a good idea to share projects with groups that are interested, 'Many hands make light work.'

Connecting with and sharing the work across these groups also helps with tracking and evaluation. After your projects begin, it is a good idea to evaluate if there is any change. You do not want to put time and effort into something that is not actually improving anything. Evaluation also helps to see how much change has occurred. Evaluating change is important to keep improving and always trying to meet islanders' needs.

Another way to share your findings is through a written report. If you have the time and resources, write out a formal report. Doing this consolidates all of your data into one document so you can easily look back and review your process and conclusions in the future. The report should include: some background information about the island, why you conducted the assessment, how you gathered the data, what you found, what the findings mean, and your next steps. If this is not the first time you have done an island assessment, include a section about what has changed from the last assessment.

For next steps, think about:

- What groups would be interested in helping meet these needs?
- How can you share what you have learned?
- What is your goal and how do you plan to meet it?
- When should this assessment be conducted again?
- What about conducting the assessment in a different season (summer vs. winter)?
- What has changed since this assessment was last done?
- What has gotten better?
- What has gotten worse?
- What is new?

## Additional Resources

### Conducting a Community Health Needs Assessment:

County Health Rankings & Roadmaps. *Assess needs & resources: Guidance and tools*. Retrieved from:

<http://www.countyhealthrankings.org/sites/default/files/Assess%20Needs%20%26%20Resources%20Guide.pdf>

Maine Shared Health Needs Assessment and Planning Process (SHNAPP). (2015). Retrieved from: <http://www.maine.gov/dhhs/mecdc/phdata/SHNAPP/county-reports.shtml>

University of Kansas Community Toolbox. <http://ctb.ku.edu/en/assessing-community-needs-and-resources>

### Interviews and focus groups:

Cohen D, Crabtree B. (2006, July). Qualitative research guidelines project. *Robert Wood Johnson Foundation*. Retrieved from: <http://www.qualres.org/HomeInte-3595.html>

Gill, P., Stewart, K., Treasure, E., & Chadwick, B. (2008). Methods of data collection in qualitative research: Interviews and focus groups. *British Dental Journal* 204 (6), 291-295. doi: 10.1038/bdj.2008.192. Retrieved from: <http://www.nature.com/bdj/journal/v204/n6/pdf/bdj.2008.192.pdf>

Guidelines for conducting a focus group. (2005). *Eliot & Associates*. Retrieved from: [https://assessment.trinity.duke.edu/documents/How\\_to\\_Conduct\\_a\\_Focus\\_Group.pdf](https://assessment.trinity.duke.edu/documents/How_to_Conduct_a_Focus_Group.pdf)

Harrell, M. & Bradley, M. (2009). *Data collection methods: Semi-structured interviews and focus groups*. Santa Monica, CA: RAND Corporation. Retrieved from: [http://www.rand.org/content/dam/rand/pubs/technical\\_reports/2009/RAND\\_TR718.pdf](http://www.rand.org/content/dam/rand/pubs/technical_reports/2009/RAND_TR718.pdf)

Krueger, R. (2002). Designing and conducting focus group interviews. *University of Minnesota*. Retrieved from: <http://www.eiu.edu/ihec/Krueger-FocusGroupInterviews.pdf>

### Analyzing qualitative interview and group conversation data:

Pell Institute. (2017). Analyze Qualitative Data. *Evaluation Toolkit*. Retrieved from: <http://toolkit.pellinstitute.org/evaluation-guide/analyze/analyze-qualitative-data/>