Technology Purchasing Guide for Providers of I/DD Services

Canadian Edition 🍁

Your step-by-step guide to getting buy-in, budget, and implementing new technology in your organization.

An eBook by

awake labs

Why technology in I/DD Services?

It is time to act on the innovations available to the developmental services sector.

Staff turnover is at an all-time high and direct support workers are even more challenging to acquire and retain than before the pandemic. This has a direct impact on the lives of the people you support. It's time to change our approach.

Technology has the potential to help us increase independence, reduce reliance on staff, and improve quality of life. It's a win-win. Still, very few developmental services providers are leveraging technology to its full potential. This guide is designed to help you bring technology to your organization.

Welcome! We are so happy you're here.

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Identify your organization's priorities

Why do you want to use technology?

The most important step in your journey is to define **why** you want to use technology. Some examples may include:
- Improving health outcomes for people you support
- Reducing the cost of your services
- Saving operational cost by reducing time spent on clinical documentation
- Improving the timeliness of interventions

Align your "*why*" with your organization's strategic priorities

It is likely that your organization has already identified strategic priorities and that these are recorded on your website, or in an annual report.

Align your **why** to these priorities. This will help you get buy-in from leaders and colleagues at your organization.

❷ Finding the right technology

Search for solutions that meet your needs

Consider technology options

Now that you are familiar with your organization's strategic priorities, which technologies have the highest chance of meeting your ***why***?

- Telehealth
- Data management
- Remote monitoring
- Wearable technology
- Smarthomes

As an organization, there are plenty of ways to spend your money. This is why it is so important to complete step one and set an objective.

Buy, build, or hold off?

When considering technology, you have 3 choices - buy, build, or hold off. Each of these options comes with its own risks, which you will need to assess.

	Pros	Cons
Buy	Faster & cheaper than building your own	Risky if it does not perform well
Build	Can be completely custom built	Requires a development team
Hold off	No need to spend extra money	You don't solve the problem you identified

❷ Finding the right technology

Connecting with vendors

Vendors are your technology partners

Connecting with technology vendors early on in your journey can help you save time, headaches and money down the road. The vendor you choose will be your partner in your technology journey. It is well worth investing time in relationship building to make sure you are able to work with them effectively.

When you first connect with a prospective technology vendor, it is important that you communicate your *why*. Their solution should be able to help you meet your objectives and the vendor should be aligned with your organization's strategic priorities.

Be specific! Ask the vendor what kinds of tools and features they offer to track the metrics you care about; what kind of training they offer you and your staff; and what an implementation timeline looks like.

Also, let them know about your existing technology infrastructure, including connectivity challenges at certain locations, whether you have full-time IT staff, and other technology solutions you already use.

After you discuss the above, you should have a much better sense of whether the vendor and their solution will help you meet your *why*. At the very least, having these conversations with vendors will make it far easier to compare them than if you simply were to go off of a brochure.
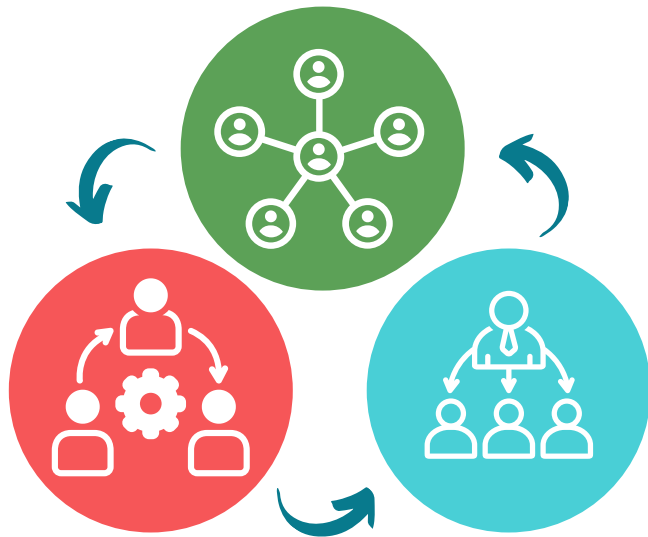
❸ Planning for success

Roles and responsibilities

Implementing technology requires time, effort and resources

The most important resource you will need is ***people***. Everyone at the organization, including leadership, direct support staff and the people you support have a role to play in the implementation of a new technology.

What we recommend:

1. **Create a stakeholder map**
   - Make a list of everyone at your organization who will be interacting with the technology and define *how* they will be using it
2. **Assign roles and responsibilities**
   - Using your stakeholder map, assign roles & responsibilities. Consider who is responsible for setup? Who is responsible for ongoing training? Who will be the main point of contact with the vendor? (Hint - this person is probably you!)
3. **Learn from other service providers**
   - Learn from other organizations that have integrated technology into their services. Ask the vendor to introduce you to some of their clients, or look for blog posts, case studies, and contacts you can talk to.

③ Planning for success

Creating your technology implementation roadmap

Once you understand the roles and responsibilities of each person that you identified in your stakeholder map, your next step is to plan a technology implementation roadmap.

Here are some key elements to consider in your implementation roadmap:

Training everyone in the stakeholder map
The people that you have identified will require different levels and types of training depending on how they use the technology. A good technology vendor will have some training material ready for you to distribute, but you still need to consider how much time & effort it will take for each stakeholder to complete it.

Setting up & deploying the technology
As much as we would like it to, technology does not always work right out of the box. You will need to set it up and make sure that everything is operating as it should. The technology vendor and your IT department will need to be involved in this step.

Ongoing support
Once each stakeholder has been trained and your chosen technology has been deployed, you will still need to provide ongoing support. Again, a good technology vendor will help you.

Tracking success metrics
One of the most important pieces to account for is how you will measure the success of your technology. Make sure that your organization keeps track of the metrics that relate to your strategic priorities so you can see if your technology choice is helping reach those goals.

❹ Creating a budget

What will it cost?

The number one question on everyone's mind when it comes to technology is "What will it cost?"

What to include in your budget

There are many costs that are associated with purchasing, implementing, and using a technology. **Be as thorough as possible in your assessment**. It is better to know & account for all the costs up front than to try to ask for a bigger budget down the road.

Your comprehensive list will include, but is not limited to:
- Hardware costs
- Software subscriptions
- Staff training
- Replacement costs
- Expansion costs
- IT infrastructure

It is possible that there are other fees that you and your vendor may not be able to anticipate. For that reason, it's always good to add an additional 5-10% to your budget. Your technology vendor should be able to confirm if your budget is reasonable. You can also connect with other service providers who have implemented technology to see if you're on the right track.

❹ Creating a budget

ROI and why it's important

Once you have created your budget it's time to consider how you will make the case for allocating the funds to your initiative. You have identified your *why*, which means that the reason to purchase your chosen technology solution is already aligned with your organization's strategic priorities.

It still comes down to dollars and cents.

You will have to explain how this technology is going to be fiscally viable in order for the decision makers at your organization to buy-in.

This is where ROI, or Return on Investment comes in.

You can create a reasonable estimate of what an ROI might be for your organization by doing the following calculation:

$$\text{Return on Investment} = \frac{\text{Final Value - Initial Cost}}{\text{Initial Cost}}$$

How to Calculate ROI

- Start with the initial cost of the technology. Fortunately, you've already created a budget using the tips on the previous page

- To calculate your final value, identify **quantifiable benefits** associated with implementing the technology. You will have to make some assumptions and educated guesses as to what these benefits might be. Next, associate the projected benefits with measurable expenses
  - For example, some technology leads to increased independence. This would lead to reduced staff time. Over time, small decreases in staff time can result in big savings.
- You should also consider increases in revenue as a function of using technology. How will this technology help you grow your organization's revenue? Will your organization attract more clients or improve capacity?

❺ Getting buy-in

Communicating ROI and value to decision makers

Here are a few tips to consider when presenting your technology choice to decision makers at your organization.

Make sure to frame the discussion in terms of the metrics that matter to your audience.

- For example, if you are speaking with your Clinical Director, make sure you present how your initiative affects clinical outcomes. If it is the Executive Director, talk about how this will align with your mission and make your organization more efficient.
- This is where your ROI calculation will come in handy. You will be able to show what kinds of benefits the technology will bring and the associated cost savings and/or increased revenue for your organization.

Tell a story. When it comes down to it, we are much more connected to people than numbers. Plenty of technology vendors have compelling case studies and stories, make sure to present decision-makers with the content that got you excited about the technology in the first place.

Present what went into your decision to choose this specific technology.

- Try to anticipate the questions and possible objections that decision-makers may have. Make sure to have an answer ready when they ask you about costs, required training, time to implementation, alternative solutions, success rates, risk factors, etc.

⑥ Implementing technology

Acting on your roadmap

Congratulations!

Now that you have successfully advocated for your technology and received the necessary budget, it's time to implement it.

Here are some extra tips to keep in mind as you follow your technology implementation roadmap

1 Make sure to inform all staff about your new technology. Letting them know a few weeks notice before you deploy it can help your staff feel included in the decision. It allows them to accept new technology with open arms, as opposed to learning the day of that there is something else they need to learn how to do.

2 No matter how user-friendly a technology may be, it is crucial for staff to go through the necessary training. There will be a learning curve and it's important to plan for that. If certain staff members are quick to pick up new technology, allow them to mentor other staff through the transition.

3 You will also have to update any policies accordingly to establish the technology as the new normal and not an optional add-on.

4 Give your team time to adjust to the new technology and be patient during the first couple of weeks. This is typically where the learning curve is steepest. Create opportunities for staff to ask questions and share their success with each other. Most organizations found it took between 3-9 months to fully implement an electronic health record system, so it's fairly safe to assume adopting new technology will not happen overnight.

5 Details of specific implementation best practices can be informed by your technology vendor or other organizations. Make sure to reach out and inform yourself of the best ways to make use of your new technology.

7 Evaluating

Are you making progress towards your **why?**

Evaluation is an ongoing process, not a one-and-done. We suggest doing this exercise quarterly. It's a great opportunity to engage with your technology vendor and discuss your progress together.

In the first part of this process, we spent a considerable amount of time thinking about your ***why***. Now is the time to tie it all together.

With your "***why***" front and center, take a look at how you are doing.
- What metrics are changing? How do you know?
- What kind of feedback are you getting from your team?
- What are the gaps to successful implementation?
  - Do you need more training?
  - Are you collecting the right data to measure success?

Towards the end of the first year, do an updated ROI calculation but this time use actual numbers, not your projections. This will give you an exact ROI number and you can determine if the technology was worth the investment.

Based on the ROI you calculate, you have several options.
- If it less than what you thought, are there specific things your organization can do to improve? Implement these changes and check for improvements in the next quarter.
- If it less than what you thought, you may choose not to continue.
- If the ROI good enough, you may consider expanding the use of the technology.
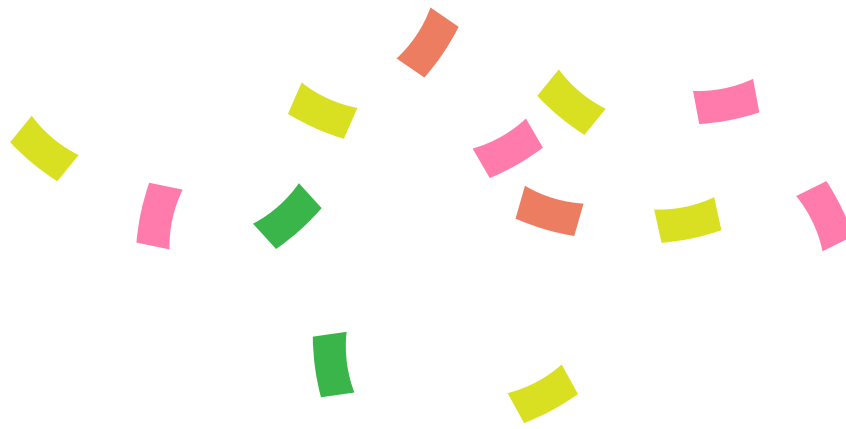
You did it!

cue the confetti and high fives

Championing innovation is no small feat. Thanks to all your hard work the people you support, your organization, and your colleagues will soon be feeling the benefits.

Way to go.

Smiling and waving,
Your friends at Awake Labs.

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About

Our technology enhances support so that adults with cognitive disabilities can live full lives in their communities. Awake Labs provides a real-time, objective measure of stress to help improve care, reduce the use of intrusive measures, and increase quality of life.

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