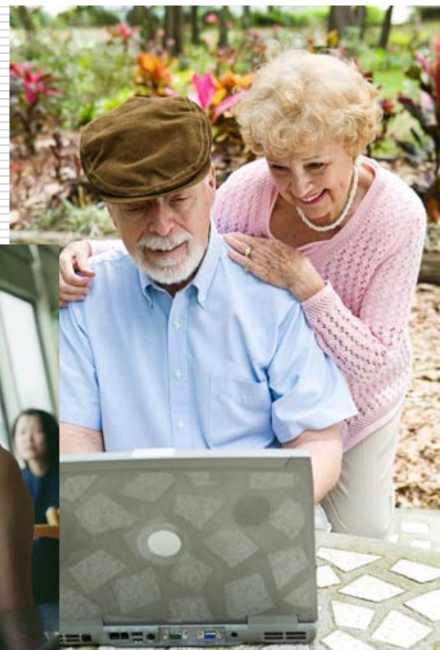
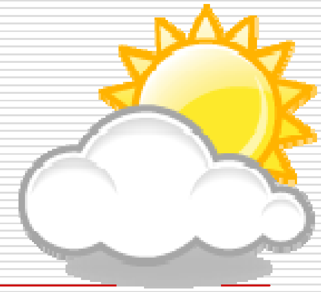
Community Resource Connections for Aging & Disabilities

A Guide to Planning for and Conducting Baseline Consumer Satisfaction Surveys

UNC CARES

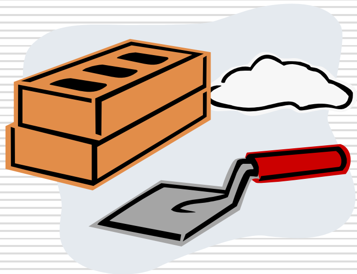


What is your work style?



- Style 1: Cloud/Visionary
  - Priority is the big picture—how it fits our mission and vision
  - Needs to know ***why*** . . .
    - The job needs to be done?
    - It has to be done this way?
    - It shouldn't be done this other way?

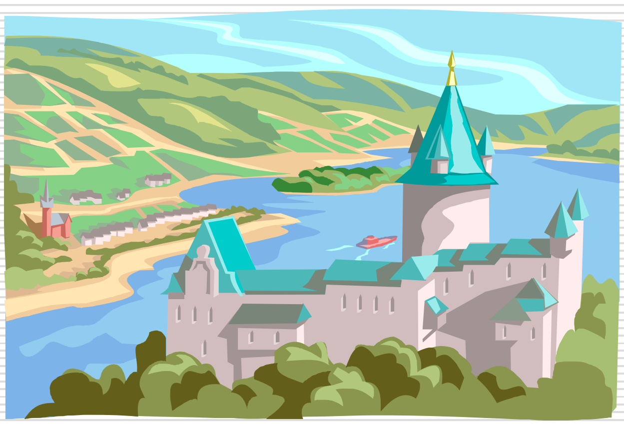
What is your work style?



- Style 2: Brick/Implementer
  - Priority is to get the job done well and efficiently
  - Needs to know . . .
    - *Exactly* what is needed
    - What resources are available
    - When in needs to be done
- Both styles are needed to build your CRC

Who’s on the call today?

- How many clouds?
- How many bricks?
- How many somewhere in the middle?

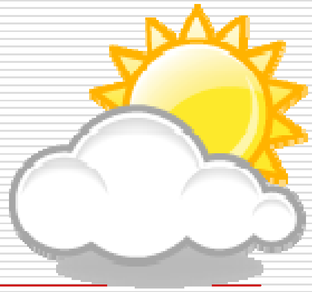


Our goal today is to deliver to the bricks, without losing the view from the clouds.

We will start with a few minutes in the clouds

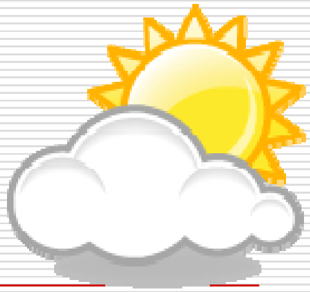
Please let us know (as we go along) if we are not meeting you needs.

What does a CRC do?



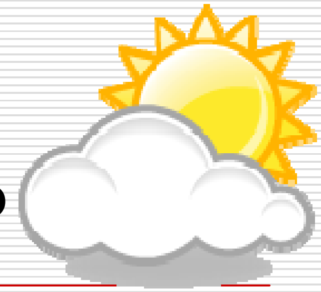
- Community Resource Connections for Aging and Disabilities (CRC)
  - creates a coordinated system of information and access for all people seeking long-term support and services
  - minimizes confusion
  - enhances individual choices
  - supports informed decision making

Why do CRCs need to do evaluation?



- Ongoing evaluation of the CRC is necessary to assure that the collaboration is:
  - accomplishing intended goals
  - serving the intended populations
  - achieving the intended outcomes.
- It is required by the federal grant

Why does evaluation need to include consumer satisfaction?



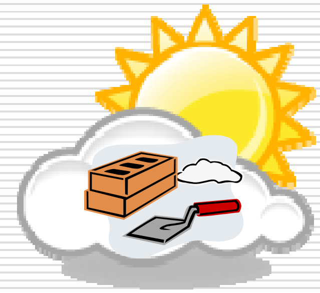
- To gauge overall satisfaction with your CRC
- To track quality of specific aspects of service
  - Timeliness
  - Courtesy
  - Accuracy
- To understand impact of your contact
  - Did the consumer get the needed service?
    - Why or Why Not?

Why do we need a ***baseline*** survey?

- It's the picture ***before*** the makeover!

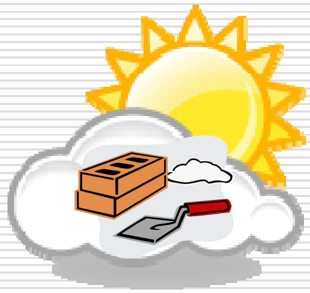

- To see if your CRC changes things or if it is just "business as usual"
- If it is "business as usual," is it ***at least*** good business?

How is the baseline survey different from post-launch CRC consumer satisfaction surveys?



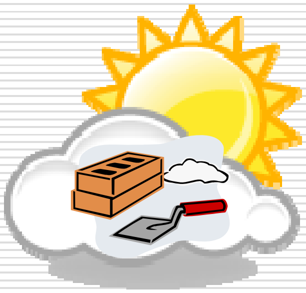
- Baseline
  - Surveys are about individual entities
    - Entity's logo
    - Entity director's signature
  - 2-month survey period
  - Sampling, if any, based on entity's contact volume
- Post-launch
  - Surveys are about CRCs as a whole
    - CRC logo
    - CRC coordinator's signature
  - Smallest CRCs send out continuously, others send two 2-month surveys per year
  - Sampling, if any, based on CRC's contact volume

The survey process, in brief



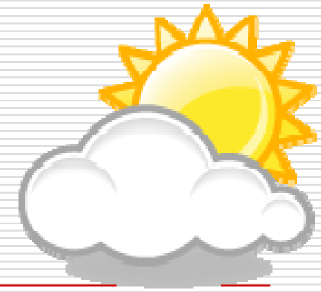
- Step 1. Make timing decisions within guidelines
- Step 2. Receive and review materials from OLTS
- Step 3. Counselors prepare consumers for survey
- Step 4. Create mailing lists
- Step 4a. Some entities may draw a sample
- Step 5. Prepare survey mailings
- Step 6. Mail out survey packets
- Step 7. Report to OLTS—dates and numbers mailed
- Step 8. Surveys come to OLTS for data entry
- Step 9. Anonymous data to CARES for analysis
- Step 10. Results

Getting Ready for the Baseline Survey:



- Step 1: Timing
  - Guidelines
    - There is a 1 to 2 week time lag between the consumer’s contact and the day you mail out the survey.

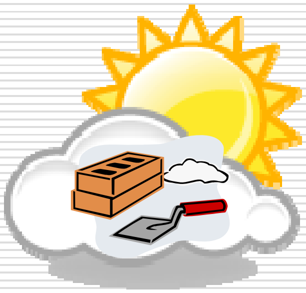
Why is it important to stay within the time guidelines?



- Too soon—Consumers will not know whether your assistance helped
- Too late—Consumers will not remember details about call quality
- If entities do not follow the same time schedule, results will not be comparable—either to each other or to their post-launch surveys.

Baseline Survey Schedule		
Tentative Launch	Dates of Consumer Contacts	Period of Survey Mailings
Sept. 14 2009	July 13—Sept. 11	July 20—Sept. 25
Nov. 16, 2009	Sept. 14–Nov. 13	Sept. 21–Nov. 27

Getting Ready for the Baseline Survey: Step 1 continued

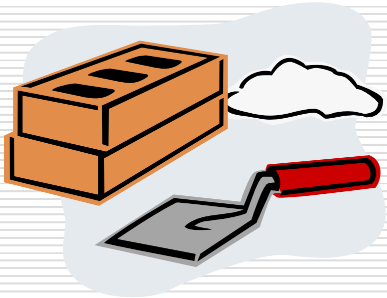


- Decide mail-out intervals
  - Example 1 (daily)
    - First day of survey period is Monday, July 13
    - On Monday, July 20, mail to consumers from July 13
    - On Tuesday, July 21, mail to consumers from July 14, etc.
  - Example 2 (weekly)
    - First day of survey period is Monday, July 13
    - On Friday, July 24, mail to consumers from July 13 –17
    - On Friday, July 31, mail to consumers from July 20-24, etc.

What do you think?

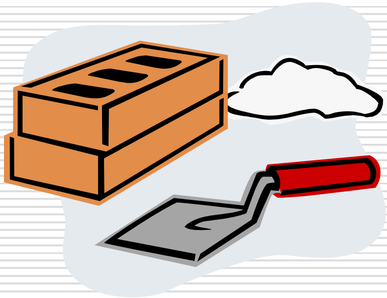
- What would be some advantages of using the daily method?
- What would be the advantages of using the weekly method
- Do you have any other ideas (within the guidelines of no less than 1 week and no more than 2 weeks after)?

Getting Ready for the Baseline Survey:



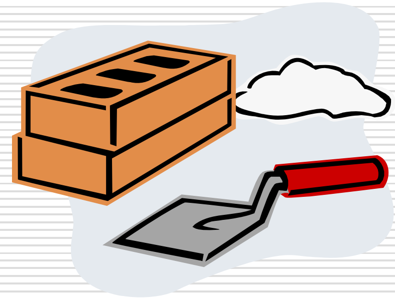
- Step 2: Receive and Review Mailing from OLTS
  - Packets will include:
    - A set of guidelines/instructions for you
    - Survey packets to mail out (based on the number of monthly contacts you reported)
    - A short form on which you will report the calendar days you did mail outs and how many you mailed each day. (Alternately, OLTS may send you electronic form so you can email it back)
    - Do you want an “original” cover letter and survey in case you run out and need to make copies?

Getting Ready for the Baseline Survey:



- Step 3: Ask counselors to prepare consumers for survey
  - During 2-month period
  - “You may be receiving a short survey in the mail asking about your experience in contacting us. Please take a few minutes to answer. This will help us know what we’re doing well, and how we may need to improve.”
  - Try to say this to most consumers, but case-to-case discretion

Getting Ready for the Baseline Survey:



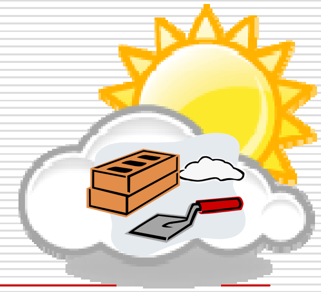
- Step 4: Create mailing list/sample frame
  - Collect/organize names and mailing addresses of eligible*consumers
    - Print out from your computerized system
    - Xerox of your written log with ineligibles marked out
    - Other?
  - You will have a list for each mail out date (daily, weekly, or other)
  - *If you will be sampling*, keep or arrange client names in a "neutral" order
    - Alphabetical—ok
    - Chronological (from 1st to last contact)—ok
    - By condition or service need—***not*** ok!

* We will talk about who are "eligible consumers" in a few minutes

About those Mailing Lists

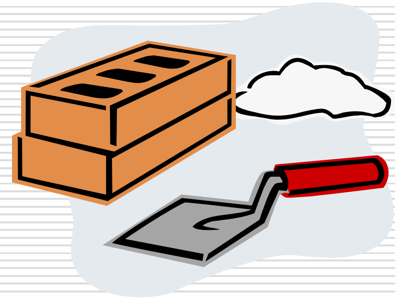
- Around half of you are already keeping names and mailing addresses
- As part of the CRC streamlining function, keeping and sharing consumer records will be required—separate from evaluation
- Not keeping records *in future* CRC? No need to do baseline survey
- Those of you not keeping records now
  - Keep names and mailing addresses 2 months before launch for the baseline survey
  - Can use whatever system you will be using at launch (or different system if necessary)
  - Consider it practice!

Who are “eligible consumers” Why not count everyone?



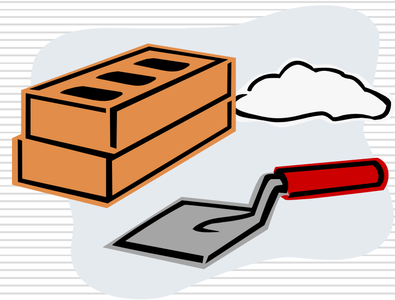
- Every day many people call and/or visit the Collaborative Operating Entities (COEs) that make up the CRC
- Not everyone who calls or visits a COE does so to get information about programs and services for older or disabled adults
- Only those who actually contact the COE for information and referral related to programs and services for older and disabled adults should be surveyed.

Count as a CONTACT:



- Individuals who call for information regarding programs and services for older and disabled adults
- Individuals who call for information about long-term services and supports options
- Individuals seeking assistance like: options counseling, benefits counseling, employment options counseling, crisis intervention, and/or planning for future long-term services needs
- Individuals desiring to gain access to private-pay services
- Individuals needing facilitation of programmatic and financial eligibility determination
- Individuals seeking access to public programs

Do not count:

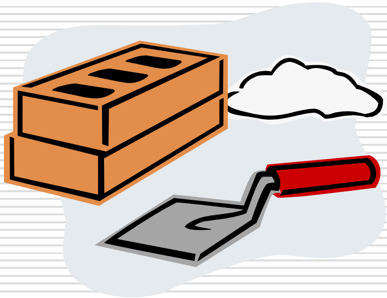


- Individuals who call or visit seeking general information.

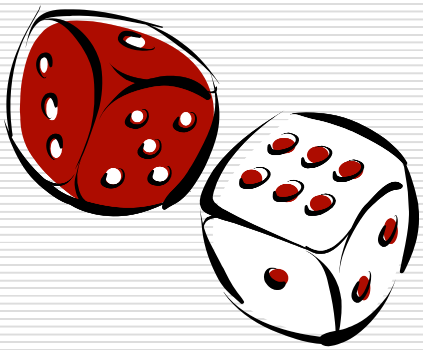
  (example: Mrs. Smith calls to see if there is a public library near her home)
- Individuals who do not engage with the counselor but just want one simple fact
- Individuals who will not identify themselves or give any contact or call-back information—whether they are calling for themselves or someone else

  (example: A woman calls and asks “where can I get a flu shot for my mother?” but does not want to identify herself or talk about anything else. Even if she does give you her name and address, you may not consider this a true I&A contact)

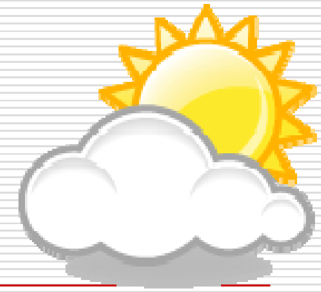
Getting Ready for the Baseline Survey:



- Step4a. Draw a sample, if appropriate
  - Most of you will be asked to survey everyone who contacts you during the designated time

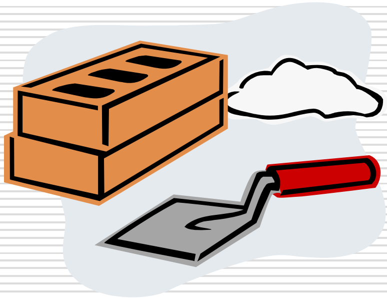


The Idea of Sampling



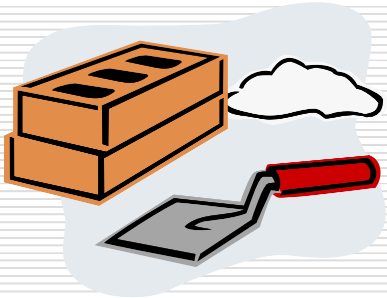
- Why do we sample?
  - To get information that accurately describes all of our consumers (the "population") without having to survey them all
- What do we need for a representative sample?
  - Large enough to capture variation
    - The smaller the group, the larger percentage you need
  - Every member of the population has an equal chance to be chosen

Will my organization be sampling or not at baseline?



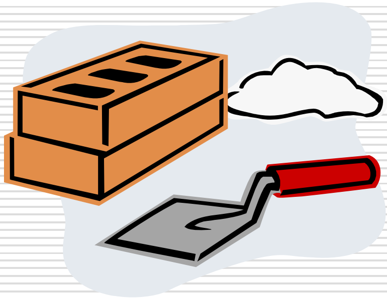
- The two-month survey period is a “time sample” of the past 6 months
- For most entities this is either the right size or a bit on the small side to give good estimates for your population
- Two entities may sample 4 out of 5 instead of all if they wish to:
  - Mecklenburg DSS/Just 1 Call (combined)
  - Mountain Projects

What About after Launch?



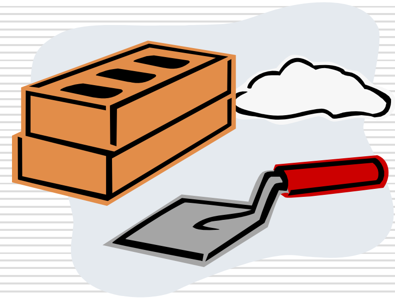
- Sample needed will be based on:
  - Whole CRC, not individual entities
  - Client tracking in the CRC, not estimates
- Three possible scenarios
  - Continuous—send a survey to every contact throughout the project
  - Two 2-month time samples per year—sample all in that timeframe
  - Largest CRCs draw a sample within the two-month period

Sampling Instructions



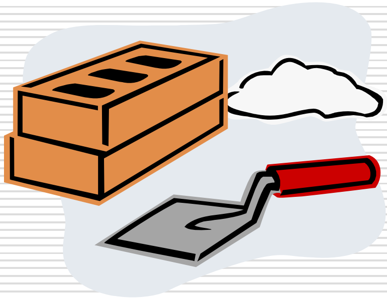
- Because few will sample within time frame for baseline
  - Separate phone call to discuss issues
  - Written instructions included in packets

Administering the survey



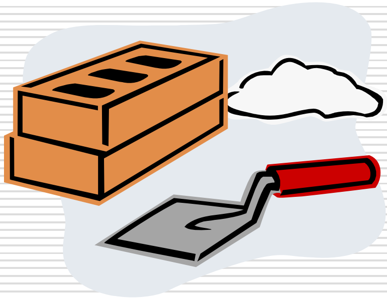
- Step 5: Prepare survey mailings
  - Packets will contain all materials and postage/metering for mailing
  - You will need to add names and addresses
    - Hand written?
    - Computer-generated labels?
    - Instill understanding of confidentiality in helpers
  - Timing
    - If sampling, wait at least until end of sample period (day for daily mailing, week for weekly mailing)
    - If not sampling, can prepare as you go, or wait until just before mailing

Administering the survey



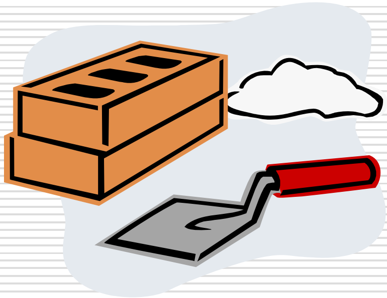
- Step 6. Mail out survey packets
  - Already stamped
  - Follow the timeline
  - Record each mailing date and the number of packets mailed on that date
  - If any come back to you (bad addresses)
    - Try to get address correction and re-mail
    - Keep a count of those never successfully delivered

After the end of the survey period



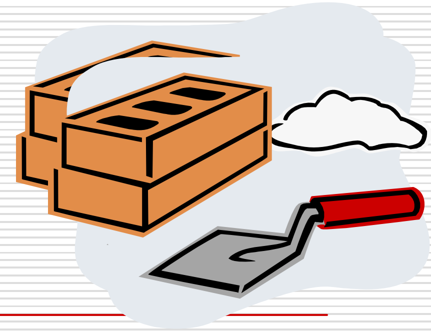
- Step 7: Report to OLTS
  - Information you recorded in step 6
    - Mailing dates and number mailed that date
    - Total undeliverable pieces (permanent bad addresses)

After the consumers complete the survey



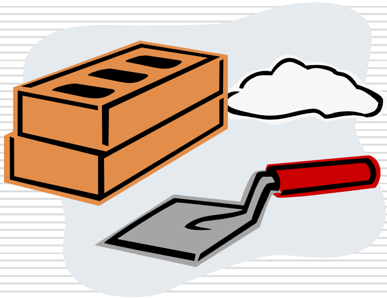
- Step 8: Surveys come to OLTS for data entry
  - Return envelopes are pre-addressed to "CRC Project Director" at OLTS
  - Data entry is done at OLTS
    - One month after your last mailing, data entry closes
    - Access database sent to CARES has code for each entity, no entity identifiers

After the consumers complete the survey



- Step 9: Anonymous data to CARES for analysis
  - Compute descriptive statistics
  - Prepare information for project evaluation reports
  - Prepare materials for local entities (using code names)
  - OLTS replaces code names with real names on materials for local use

Two to three months after data entry is complete



- Step 10: Results
  - Local entities receive:
    - Microsoft power-point presentation
      - Stakeholders
      - county officials
      - funding sources
    - Bullet list summary of key findings
  - When entity has *very* low volume, there may be too few respondents to give reliable results.

If you have questions:

- ASK!

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