

Senior Companion Program Performance Measure Surveys

Information Packet

Revised 1/9/14

Senior Corps Survey Technical Support

- Telephone: 1-800-207-0750
- Email: SCSurvey@jbsinternational.com

Online Resources:

<http://www.nationalservice.gov/resources/scp-surveys>

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Senior Companion Program Performance Measure Surveys Information Packet

I. Introduction

This packet provides information on how to use performance measure surveys to measure the benefits (outcomes) for clients and caregivers due to services provided by Senior Companions.

SCP grantees can use the surveys for Healthy Futures performance measures H9 and H14.¹ These surveys may replace what you are currently using for performance measures.

- The *Senior Companion Program **Independent Living** Performance Measure Survey* measures **H9**, “Number of homebound or older adults and individuals with disabilities who reported having increased social ties/perceived social support.”
- The *Senior Companion Program **Respite** Performance Measure Survey* measures **H14**, “Number of caregivers of homebound or older adults and individuals with disabilities who reported having increased social ties/perceived social support.”

What You Need to Do

As of PY 2013, if you are beginning a new SCP three-year funding cycle and you are measuring H9 or H14, you are required to use these surveys. These are the steps.

Step 1: Prepare to Collect the Surveys

- a. Talk to stakeholders to keep them informed.
- b. Identify which clients and/or caregivers should get a survey.
- c. Decide how to give out the surveys.
- d. Prepare survey helpers.

Step 2: Give out the Surveys

- a. Distribute the surveys to clients and caregivers.
- b. Collect the surveys; follow up with people to return surveys.

Step 3: Summarize the Data

- a. Enter the survey data in the CNCS spreadsheet (recommended).
- b. Report the results in eGrants.

These three steps are described in more detail on the next page, along with page references showing where you can find a complete description of each step later in the packet.

¹ For more information about CNCS performance measures, see: <http://www.nationalservice.gov/resources/performance-measurement>. For more information on measures H9 and H14 in particular, see: National Performance Measures Instructions (<http://www.nationalservice.gov/sites/default/files/editor/2013-SCP-National-Performance-Measures-Instructions-FINAL.pdf>).

Step 1: Prepare to Collect the Surveys

- a. *Talk to stakeholders to keep them informed.*** (See page 5.) Let stakeholders (staff, advisory board, volunteers) know about the surveys, what the survey data are used for, and if you need their help.
- b. *Identify which clients and/or caregivers should get a survey.*** (See page 5.) People who have received the minimum level of SCP services as indicated in your work plan should get a survey. You may need to work with your volunteer stations to put together complete lists of clients and caregivers. The lists will help you track who should get a survey, who has completed a survey, who you will need to follow up with, and who will need assistance.
- c. *Decide how to give out the surveys.*** (See page 6.) Consider which option(s) is most practical for your project:
 - in person, by handing it to the clients and caregivers to fill out;
 - in person or over the telephone, by reading the survey to them and taking down their answers on paper or on a computer/mobile device using an electronic version of the survey;
 - sending it to them through the mail; or
 - emailing them a link to the survey which they would fill out online.
- d. *Prepare “survey helpers”.*** (See page 8.) Volunteers, staff, or advisory board members could assist with giving out the survey. They should be prepared in advance so clients and caregivers are given consistent, accurate information and confidentiality is protected. Some clients and caregivers may need special assistance. Note that Senior Companions will not be able to assist their own clients/caregivers to do the survey.

Step 2: Give out the Surveys

- a. *Distribute the surveys to clients and caregivers.*** (See page 9). The steps involved will depend on how you decided to give out the surveys: in person, through the mail, over the telephone, or online.
- b. *Collect the surveys; follow up with people to return surveys.*** (See page 9.) Follow up with clients and caregivers to get as many surveys returned as you can.

Step 3: Summarize the Data

- a. *Enter the survey data in the CNCS spreadsheet (recommended).*** (See page 9.) To tally results, enter the responses from each completed survey into the *Client-Caregiver Surveys Spreadsheet* (or another system if you have one).
- b. *Report the results in eGrants.*** (See page 9.) Once you have entered all the survey data, the spreadsheet totals the numbers for you on a summary sheet. Report these numbers in eGrants when you report your performance measure results.

II. The Senior Companion Program Performance Measure Surveys: FAQs for Project Directors

Who is required to use the surveys?

As of PY 2013, all Senior Companion Program (SCP) grantees beginning a new grant (3 year cycle) must use the surveys to measure outcomes they have included in their grant—H9 and/or H14. Grantees that have not yet begun a new three-year grant cycle may use the surveys but are not required to.

Can RSVP grantees also use the surveys?

Yes, RSVP grantees can use the surveys but they are not required to.

Where do we find the surveys?

The Senior Companion Program **Independent Living** Performance Measure Survey and Senior Companion Program **Respite** Performance Measure Survey can be downloaded at the National Service Knowledge Network (<http://www.nationalservice.gov/resources/scp-surveys>).

The surveys are available in English, Arabic, Chinese, French, German, Hindi, Italian, Korean, Polish, Portuguese, Russian, Spanish, Tagalog, and Vietnamese.

Can we change the surveys?

No, do not change the surveys. It is very important that the survey questions are NOT altered in any way. Changing a question will prevent CNCS from combining the data from all SCP grantees. However, if you would like to add questions, put them at the end of the survey on a separate page.

Who should complete the surveys?

Clients (if you are measuring H9) and caregivers (if you are measuring H14) who have been receiving SCP services for at least the minimum amount of time indicated in your work plan should complete the surveys.

If clients are unable to complete the survey themselves, a family member or caseworker may complete the survey for them.

The surveys are voluntary. If a client or caregiver chooses not to do a survey, their access to services will not be affected.

When do clients and caregivers complete the surveys?

Clients and caregivers should complete the survey at some point after they receive the minimum amount of service. This can be scheduled at any time during the year.

For technical assistance, call 1-800-207-0750 or email SCSurvey@jbsinternational.com.

What are the options for conducting the surveys?

You can give the survey to the client or caregiver in any of the following ways:

- In person, by handing it to them to fill out;
- In person or over the telephone, by reading it to the client or caregiver and taking down their answers on paper or on a computer/mobile device using an electronic version of the survey;
- Sending it to them through the mail; or
- Emailing them a link to the survey which they would fill out online.²

Regardless of how you conduct the survey, surveys must be kept confidential. This means there are no names on the completed surveys and they are stored in a safe place.

Who can help with survey data collection?

Senior Companion volunteers and project staff can hand out the survey to clients/caregivers to do it on their own. However, Senior Companions cannot help their **own** clients/caregivers to complete the survey, or do the survey for them. For example, Senior Companions cannot read the questions to their clients and take down the answers for them. SCP staff may ask questions and record them for the clients and caregivers.

What do we do with the completed surveys?

Keep the surveys for your records. These are your data and you should be able to produce them for CNCS.

How do we analyze and report results?

It is recommended that you use the *Client-Caregiver Surveys Spreadsheet*, available at the National Service Knowledge Network to analyze the results. The summary page of the spreadsheet automatically calculates the numbers to report based on the survey data you enter.

Report results for H9/H14 in eGrants when you complete your Progress Report (PPR). For grantees that started a new grant in FY 2013 and FY2014, you will use the new PPR Performance Measures Module to enter your results. If you are a continuing grantee who chose to use the survey, you will enter the results as part of your PPR work plan results.

² You can get an electronic version of the survey by calling Senior Corps Surveys Technical Support at 1-800-207-0750. You will need a paid account with SurveyMonkey.

III. Steps from Data Collection to Reporting

The steps are described below with references to additional material in this packet.

Step 1: Prepare to Collect the Surveys

a. Talk to Stakeholders to keep them Informed

Let stakeholders know about the surveys, what the survey data is used for, and if you might need their help. In addition to clients, caregivers, and volunteers, stakeholders can include: your sponsor's Board of Directors, your Advisory Council, program managers and coordinators, in-service facilitators, and volunteer stations. See Appendix F for "talking points" that you may want to use.

b. Identify which Clients and Caregivers should get a Survey

Clients and caregivers who have received the minimum level of SCP services as indicated in your work plan should be surveyed.³

You may be measuring H9, client outcomes, and/or H14, caregiver outcomes. Not all projects have both independent living *and* respite care services.

- If you are measuring H9, you will be giving clients the SCP ***Independent Living Performance Measure Survey***.
- If you are measuring H14, you will be giving caregivers the ***Senior Companion Program Respite Performance Measure Survey***.

You may need to work with your volunteer stations to put together a complete list of clients and a complete list of caregivers. The lists can help you track who should get a survey, who has completed a survey, who you will need to follow up with, and who will need assistance. See the sample *Survey Tracking Sheet* in Appendix L. You will need to track:

- Which clients/caregivers received at least the minimum level of service;
- Who should get a survey in a language other than English;
- Who has special needs that will require assistance to complete the survey (for example, someone with difficulty seeing or reading may need the questions read to them);
- Who will need someone else to answer the questions for them, and who can do it (a close family member or caseworker); and
- Who has completed a survey and not turned one in yet.

³ You decided the minimum level of service when you described your service activity/intervention. It is the number of days or hours of service that you thought would be needed to have some effect in reducing social isolation.

If Clients cannot Complete a Survey

Some clients will need assistance to complete the survey due to difficulty reading, seeing or filling out the form; a survey helper can provide this assistance (see *Preparing Survey Helpers to Collect Data*). However, if clients cannot complete the survey because they do not understand or cannot answer the questions, a family member or caseworker can do the survey for them. For example, a client with severe cognitive impairment may have a close family member complete the survey.

In deciding whether or not a client can complete the survey, consider how you would normally get personal information for this client. If this means you rely on someone other than the client, then you should rely on someone else to complete the survey for that client.

Always get permission from the client before asking someone to complete the survey for him or her. The client may suggest someone, such as an adult child. Note that the client's Senior Companion may not complete the survey for the client, or assist the client to complete the survey, even if the client suggests it.

In deciding who could complete the survey for the client, consider if this person:

- Is in regular contact with the client;
- Understands the client's daily living situation;
- Knows what the Senior Companion does for the client; and
- Knows how the client feels about the Senior Companion.

If someone else will complete the survey for the client, use the introduction in the *Survey Fact Sheet* (Appendix A) to explain the survey.

c. Decide How to Give Out the Surveys

You can give the survey to the client or caregiver in any of the following ways:

- In person, by handing it to them to fill out;
- In person or over the telephone, by reading it to the client or caregiver and taking down their answers on paper or on a computer/mobile device using an electronic version of the survey;
- Sending it to them through the mail; or
- Emailing them a link to the survey which they would fill out online.

Following are brief descriptions of each option. In addition, the *Data Collection Plan and Schedule* in Appendix G lists the tasks involved for each way. Consider which option is most practical for you given your clients, caregivers, and project resources. You may want to use a

combination of options to ensure that you are able to collect surveys from as many of your clients and caregivers as possible.

In Person

The survey can be given directly to clients and caregivers in person by project staff or Senior Companion volunteers. You would need to prepare volunteers and/or staff to act as “survey helpers.”

Giving the survey in person would involve handing a paper copy to the client/caregiver to complete on their own, or reading the questions to clients/caregivers and marking down their answers on a paper survey or on a mobile device. If survey helpers are Senior Companions, they can hand the survey to their own clients/caregivers to complete, but they will not be able to read the questions and mark down the answers.

If you give out the survey on paper, you will need a copy of the survey and a sealable envelope for the survey helper to give each client or caregiver. The envelope should have the Project Director’s name and office address on the front. Clients and caregivers will use the envelopes to seal their surveys when they are finished and hand it back to the survey helper, or mail it to your office, if they prefer.

If your survey helpers give the survey using a mobile device, you will need an electronic copy of the survey through a paid account with SurveyMonkey (<http://www.surveymonkey.com>). (Call Senior Corps Survey Technical Assistance to get the survey transferred to your account.) The survey helper would access the survey online, read the questions to the client/caregiver, and fill out their answers. Note that if Senior Companions are survey helpers, they will not be able to give the survey to their own clients/caregivers this way.

Telephone

The survey can be given to clients or caregivers over the telephone by project staff or volunteers who have been prepared in advance. Survey helpers would read the questions to clients/caregivers and take down their answers on paper, or online if you have an electronic copy of the survey. Again, if survey helpers are Senior Companions, they will not be able to conduct the survey with their own clients/caregivers.

Conducting the survey over the telephone involves collecting telephone numbers; setting up call times with clients and caregivers in advance; and preparing survey helpers. Assume each interview could take 10-20 minutes. See Appendix J for information about conducting the survey by telephone.

Mail

The survey can be mailed to clients/caregivers to complete on their own. A mail survey involves collecting mailing addresses; preparing a cover letter and self-addressed stamped envelopes; and making copies of the survey and cover letter. You will need to address and stuff envelopes, mail the surveys and possibly a follow-up reminder, and collect and store completed survey forms as they come in. See Appendix I for instructions on mailing the survey.

Online

Clients and caregivers can fill out the survey online if they have internet access and are comfortable with this option. Call the Senior Corps Survey Help Desk to get an electronic copy of the survey. You will need a paid account with SurveyMonkey so the survey can be transferred to your account.

Once you have the survey in your account, do not make any changes to it. You will need to email the link to the survey to clients/caregivers with a cover message. See Appendix K for instructions on conducting the survey online.

Scheduling Data Collection

Consider your timeline by first thinking of your reporting due date and working backwards. The amount of time it will take to collect surveys depends on how you plan to do it, your available resources, and the number of clients and caregivers to survey. Remember you do not need to do all the surveys at once; you just need to make sure the clients and caregivers have received the minimum amount of service before they are given a survey. You might want to give out the surveys over the year, during regular staff visits to clients, for example, if your organization does this.

You may want to use the *Data Collection Plan and Schedule* in Appendix G to help you plan.

d. Prepare Survey Helpers

It is very important that anyone giving the survey directly to clients and caregivers is prepared in advance. Minimally, they will need to know the following:

- How to introduce the survey and answer questions about it;
- How to maintain confidentiality;
- What they can and cannot do to assist; and,
- What to do with completed surveys.

See *Preparing Survey Helpers to Collect Data* for sample training sessions that you can adapt for staff and volunteers.

Step 2: Give out the Surveys

a. Distribute the surveys to clients and caregivers.

The steps involved will depend on how you decided to give out the surveys: in person, through the mail, over the telephone, online, or some combination. If survey helpers are assisting, be sure to provide support. Check in with them regularly to see if they have questions and ensure they are following the correct procedures.

b. Collect the surveys; follow up with people to return surveys.

As you collect surveys, track who has received one and who you will need to follow up with (see the Survey Tracking Sheet in Appendix L for an example). If survey helpers are assisting, include information from them in your tracking sheet about who they gave a survey to and whether it was returned. You can add their information to your Survey Tracking Sheet.

Follow up with clients and caregivers to get as many surveys returned as possible. If you can collect surveys from a large percentage of clients and caregivers, you can be more confident of the results.

Step 3: Summarize the Data

a. Enter the Survey Data in the CNCS Spreadsheet (RECOMMENDED)

To summarize the results, enter the responses from each completed survey into an Excel spreadsheet, the recommended *Client-Caregiver Surveys Spreadsheet*.

The *Client-Caregiver Surveys Spreadsheet* has step-by-step instructions and is simple to use. It automatically calculates results and gives you the numbers that you will need to report for measures H9 and H14.

If you are using SurveyMonkey, you will need to download the data after all surveys have been collected and copy and paste the data into the optional *Client-Caregiver Surveys Spreadsheet*.

b. Report the Results in eGrants

If you measured H9, client outcomes, you will be reporting the “number of homebound or older adults and individuals with disabilities who reported having increased social ties/perceived social support”. This data comes from the *Senior Companion Program Independent Living Performance Measure Survey*.

If you measured H14, caregiver outcomes, you will be reporting the “number of caregivers of homebound or older adults and individuals with disabilities who reported having increased social ties/perceived social support”. This data comes from the *Senior Companion Program Respite Performance Measure Survey*.

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The *Client-Caregiver Surveys Spreadsheet* totals the numbers for you on the summary sheet once you have entered all the survey data. Report these numbers in eGrants when you report your performance measure results.

For technical assistance, call 1-800-207-0750 or email SCSurvey@jbsinternational.com.

IV. Preparing Survey Helpers to Collect Data

Sample Training Sessions

This section contains materials to help you train volunteers and/or staff to collect surveys from clients and caregivers. Materials include two sample training sessions with detailed facilitator notes and practice exercises. Each session takes about 60-75 minutes. The sessions can be used “as is” or modified to fit the needs of your audience. For example, you may choose to spend more or less time on each of the activities and omit or add your own activities. You may also want to enlist Senior Companion leaders to assist, or lead the training, if available.

Survey Helper Training Session 1: Giving the Survey to Clients/Caregivers to do on Their Own includes instructions on how to introduce the surveys, answer basic questions, and give the surveys to clients and caregivers. Consider giving this session to all volunteers and staff that may be involved in this task. Also, see Appendix H for a *Survey Helper Packet* that volunteers or staff persons could use when collecting surveys.

Survey Helper Training Session 2: Giving the Survey to Clients/Caregivers in an Interview Format is a follow-up session for those staff or volunteers that will assist clients and caregivers who need help filling out the survey. Assistance involves reading questions and marking down the client’s or caregiver’s answers.⁴ Ideally, a staff person or Advisory Council member could provide this assistance. However, if staff is not available, a small group of volunteers could be trained to provide assistance.

Senior Companions should never assist their own clients and caregivers to complete the surveys, but they may assist *other* volunteers’ clients and caregivers if needed.

⁴ For clients who are not able to answer the survey questions, a family member or caseworker can complete the survey on their behalf (see performance measure instructions: National Performance Measures Instructions (<http://www.nationalservice.gov/sites/default/files/editor/2013-SCP-National-Performance-Measures-Instructions-FINAL.pdf>)).

Survey Helper Training Session 1: Giving the Survey to Clients/Caregivers to do on Their Own

Introduction

This is a 60-75 minute session for training volunteers and/or staff to give out the *Senior Companion Program (SCP) Performance Measure Surveys*. It is a general introduction to the surveys and includes instructions on how to tell the clients and caregivers about the surveys, answer basic questions, and give the surveys to clients and caregivers to fill out on their own.

The session may be used “as is” or adapted to fit your needs. For example, not all SCP projects provide respite care services to caregivers; they may only directly serve clients by providing companionship and independent living services. If this is the case for your SCP project, you can omit the *SCP Respite Performance Measure Survey* from the training materials and discussion.

Learning Objectives

By the end of the session, participants will:

- Understand the purpose of the *Senior Companion Program Performance Measure Surveys* and who will be asked to complete them;
- Feel confident about explaining the survey to a client or caregiver and answering their questions; and
- Understand how to protect confidentiality.

Materials

Optional PowerPoint slides with abbreviated notes are available to use with this presentation at <http://www.nationalservice.gov/resources/scp-surveys>.

Participants will need a copy of the *Survey Helper Packet* (see Appendix H), which contains the following:

- *SCP Independent Living Performance Measure Survey*
- *SCP Respite Performance Measure Survey*
- *Survey Helper Instructions*
- *Survey Fact Sheet*

Participants will also need a copy of the [Exercise Worksheet: Questions about the Surveys](#) (page 24).

This symbol  will cue you as to when to give out the handouts during the session. You may also want to place index cards on tables so participants can offer comments and feedback.

Sample Agenda: Session 1

Below is a sample agenda with estimated times for each section.

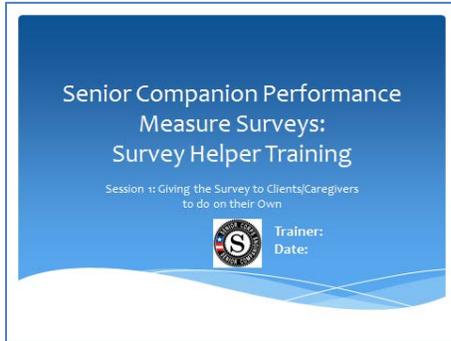
This is only one way to prepare staff and/or volunteers to be survey helpers. Revise the session to fit the needs of your audience.

Activity	Estimated Time	Method	Slide # (optional)
Welcome and Introduction	10 min.		1
Learning Objectives		Lecture	2
Distributing the Surveys to Clients and Caregivers	20 min.		3
<ul style="list-style-type: none"> • How to Give out the Surveys • Confidentiality • Special Situations  <i>Survey Helper Packet</i>		Lecture; large group discussion	4-6
The SCP Performance Measure Surveys	40 min.		
Review of the Two Surveys		Lecture	
<ul style="list-style-type: none"> • Exercise: Understand the Surveys • Honest Answers  <i>Exercise Worksheet: Questions about the Surveys</i>		Complete a survey individually; do the worksheet in pairs; large group debrief	7-9
Closing	5 min.		10
Final questions		Large group	

Facilitator Notes

Welcome and Introduction

Welcome participants to the training and make introductions. (Show slide 1.)

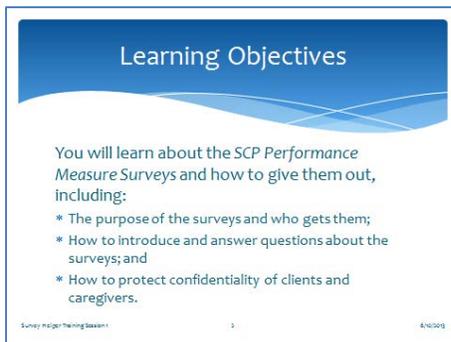


Explain that the Senior Companion Program asks organizations to survey people who receive Senior Companion services to understand how they benefit. The purpose is to learn how the support of a Senior Companion may affect a person's life.

Participants will be asked to help distribute surveys to clients and caregivers. Everyone who gives out the surveys will need to do it the same way so the survey data collected from different Senior Companion projects can be combined.

Learning Objectives

Describe the learning objectives. (Show slide 2.)



“By the end of the session, you will:

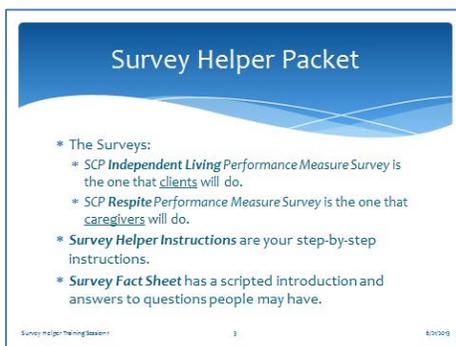
- Understand the purpose of the surveys, and who will be asked to complete them;
- Feel confident about explaining the survey to a client or caregiver and answering their questions; and,
- Understand how to protect confidentiality.”

Tell participants when they would be giving out surveys, and to whom, so they can picture this. For example: “All Senior Companions will be handing their clients and caregivers a survey to do on their own. This will take place over the next two weeks. Today, we will tell you what you need to know about that. We will give you the surveys and everything you need.”

TIP: Energize the group. Before you get into the training, do a short warm-up exercise or “ice breaker” to energize the group and make them feel more comfortable. For example, go around the room and have everyone tell one thing about themselves that they think would surprise other people (for example, a special talent or a unique experience). Or ask people to share one thing that is “on their person” that they feel represents them. It can’t be their phone, but it can be almost anything else, such as: a shirt, a picture from a wallet, a favorite lipstick, or a receipt from a beloved store. This helps people to think outside the box and identify how what they have with them represents their personality.

Distributing the Survey to Clients and Caregivers

This section talks about how to give the survey to clients and caregivers. (Show slide 3.)



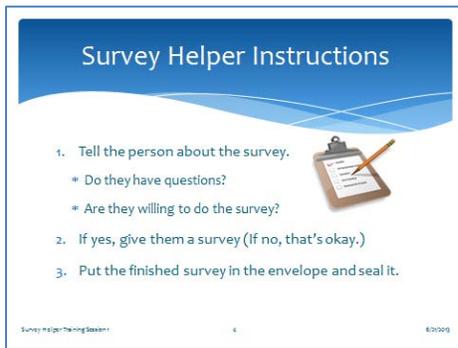
How to give out the Surveys



Hand out the *Survey Helper Packet* and explain the contents briefly:

- The two surveys are on pages 1-4. Page 1-2 are the *SCP Independent Living Performance Measure Survey* for clients. Pages 3-4 are the *SCP Respite Performance Measure Survey* for caregivers.
- Page 5 has step-by-step instructions for the person giving out the survey, or the survey helper.
- Pages 6-7 is a *Survey Fact Sheet* which includes a scripted introduction and questions that people might have, with the answers survey helpers can give.

Ask participants to turn to page 5, *Survey Helper Instructions*: “We will take a close look at the surveys in a moment. First, let’s talk about exactly how we’ll do this.” (Show slide 4.)



Read the steps on the *Survey Helper Instructions* aloud or ask someone else to read them, including the script for “introduce the survey” on page 6. Ask if there are any questions about how to give out the surveys so far.

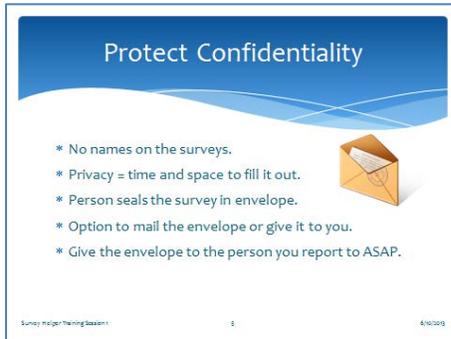
TIP: Define the terms. Make sure participants know who is meant by clients and caregivers, and what is meant by independent living and respite services. For example:

- “Clients” are the people you visit to provide companionship and other assistance that helps them remain living in their homes. They receive “independent living” services from Senior Companions.
- “Caregivers” are the people who take care of a loved one at home. Caregivers receive respite services from Senior Companions. “Respite” means they get a break; someone helps out with their loved one for a while so they can take care of other things. (In this situation, there are two people involved, a caregiver and a homebound individual, but only the caregiver should get a survey because respite is the purpose of the service.)

Confidentiality

Tell participants that protecting the confidentiality of the clients and caregivers who do the survey is a very important part of the survey helper role. Confidentiality means that information is kept private. Acknowledge that, of course, this is nothing new for them because this is an important part of the Senior Companion/project staff role as well.

Ask the group: “How would you protect confidentiality as a survey helper?” After they have had a chance to give their ideas, show slide 5.



Add these instructions to their suggestions:

1. No names on the surveys. Remind the client or caregiver not to put their name on the survey when you hand it to them. The surveys are anonymous.
2. Give the person privacy to fill out the surveys. This means giving the client or caregiver enough space and time to fill it out on their own. It might also mean leaving the survey and envelope with the person and picking it up at the next visit or letting the person mail the survey.
3. If the person will do the survey while the survey helper is present, ask them to put the survey in the envelope and seal it before turning it in.
4. Follow instructions about who to give the surveys to afterward. Do not share the surveys with anyone.

Special Situations

Tell the survey helpers that there are some situations where it will be necessary for someone else, such as a close family member, to do the survey for the person. For example, the client has dementia and it would be too difficult for that person to answer the questions. In these cases, survey helpers may be asked to hand the survey to a family member instead of the client, with a cover letter that the project will provide. In these situations, project staff should let family members know about the survey in advance, before the survey helper arrives.⁵

⁵ Projects may want to mail the survey to the family member instead of having a survey helper deliver it.

Some clients and caregivers can answer the questions but need assistance because they have difficulty seeing, reading, or writing.⁶ **If the survey helper is the person's Senior Companion, they will not be able to assist.** Staff will need to make arrangements for another person to assist these clients and caregivers.

TIP: Practice with a "role play". This will help participants feel more prepared. Have participants pair up with a partner. Have one person play the survey helper and the other play the client or caregiver. The survey helper can introduce the survey and hand the survey and envelope to the client/caregiver. The client/caregiver can ask a few questions.

The SCP Performance Measure Surveys

This section will help survey helpers become familiar with the two surveys so they can be ready for questions the client or caregiver may have.

Review of the Two Surveys

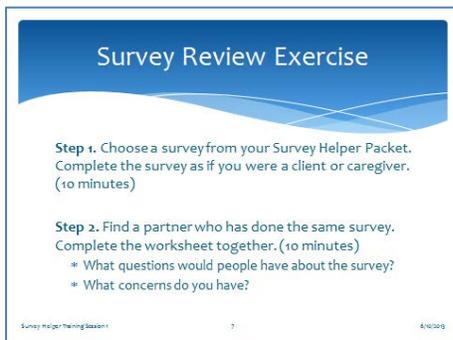
Refer participants to the *Survey Helper Packet*: "Let's look more closely at the surveys that clients and caregivers will be asked to fill out. Clients who receive companionship services will do the *SCP Independent Living Performance Measure Survey* (see pages 1-2). Caregivers will do the *SCP Respite Performance Measure Survey* (see pages 3-4.)"

Exercise: Understanding the Surveys

The purpose of this exercise is to help participants get familiar with the surveys, and think about issues that may arise for a client or caregiver filling out the survey. The exercise will take about 40 minutes in total.

You will need a copy of Exercise Worksheet: Questions about the Survey for each participant. Participants will be using the surveys in their *Survey Helper Packets*.

(Show slide 6.)



⁶ Session 2 is a sample training to help prepare survey helpers who will assist clients and caregivers by reading the questions to them and marking down their answers.

Instructions:

1.  Give everyone a copy of the *Exercise Worksheet: Questions about the Survey*.
2. Ask them to think about the people they serve. Ask them to take a few minutes and fill out one of the surveys in the *Survey Helper Packet*, just as if they were a client or caregiver. (This is just an exercise to help them get familiar with the survey. They do not need to turn it in.)
You may want to ask half of the participants to fill out one survey and the other half to fill out the other survey (“Everyone on the left side of the room do the independent living survey on page 2; everyone on the right side of the room do the respite survey for caregivers on page 4”). Or, you may want to let participants choose the survey.
3. After everyone has finished (about 5-10 minutes), ask them to partner with someone who completed the same survey.
4. Ask each pair to take 10 minutes to discuss and write down answers to the worksheet questions.

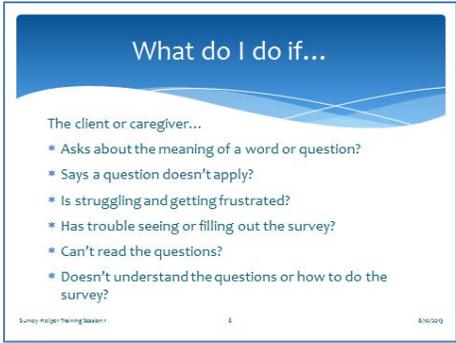
Debrief:

Use this time (about 20 minutes) to help the group get comfortable with the surveys and ask questions about them.

1. Call the group together and ask them to refer to their notes on the worksheet. So that everyone is clear during the discussion, talk about one survey at a time (e.g., ask everyone who did the *SCP Independent Living Performance Measure Survey* to share their thoughts first, and then move on to the *SCP Respite Performance Measure Survey*).
2. Referring to question 2 on the worksheet, ask: “Thinking about the people you serve, would they have any difficulties filling out this survey?” “What questions would they have?” “How would you handle that?” “What do others think?” (See “Issues Participants May Raise” for suggestions on handling problems that come up.)
3. Refer to question 3 on the worksheet: “Do you have any other thoughts on this survey?” Let the group offer possible solutions to concerns raised: “Does anyone have an idea of how to handle that?” Refer to the *Survey Fact Sheet* on pages 6-7 of the *Survey Helper Packet* for the recommended response.
4. Discuss the second survey, referring to questions 2 and 3 on the worksheet.

TIP: If the discussion turns into a general criticism of the survey... Let participants know that the surveys will not be changed at this time, so survey helpers should do the best they can. The Senior Companion Program respects their judgment, knows they can handle this important task, and appreciates their help. For those interested in passing along suggestions, encourage them to note them on an index card and then pass those on to your CNCS program specialist.

Below are some issues that may come up during the debrief discussion. Before you go on, be sure that survey helpers know what to do if any of these things occur. (Show slide 7.)



Issues Participants May Raise

If a client or caregiver...	What should the survey helper do?
Asks about the meaning of a word or question	Encourage the person to think about the meaning on his/her own. There is not one exact or “correct” meaning. Whatever it means to the client or caregiver is okay. There are no right or wrong answers. If the client or caregiver is literally asking for a language translation for a word or two, then it is okay to translate for them. However, if the person is having trouble with more than a few words, the survey helper should ask the staff person they usually report to if the survey is available in that person’s first language.
Notes that the question does not apply to their situation	Tell the person to leave the question blank.
Is really struggling with a particular question, or doesn’t want to answer a question	Remind the person that it is okay to leave it blank.

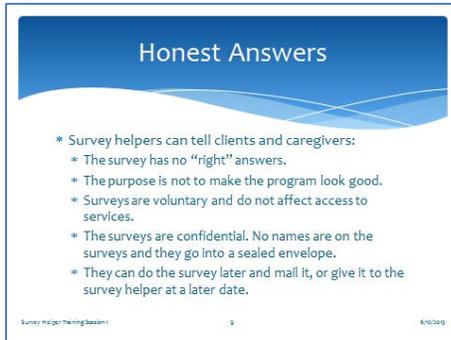
If a client or caregiver...	What should the survey helper do?
Does not want to do the survey, or is trying to do the survey but struggling and getting frustrated	Remind the person that he/she doesn't have to do the survey. The survey is completely voluntary and will not affect their access to services.
Has trouble reading, seeing, or filling out the survey	Tell the staff person that you usually report to so someone can assist this person at a later date.
Does not understand the questions and/or how to fill out the survey	The survey helper should tell the staff person they usually report to. This might be a situation where another person, such as a family member or caseworker, can do the survey for that person.

Important: Make sure that Senior Companions know they cannot do the survey for their client or caregiver, or help them to do it, no matter how well they know that person. This is because the survey asks how having a Senior Companion has affected the client or caregiver's life, and it is important that the person feel comfortable answering the questions. Even though Senior Companions might normally help their clients with paperwork, this time they should not be reading the questions to clients/caregivers or explaining them. If they believe their client/caregiver will have difficulty doing the survey on their own or will not understand the survey questions, they should tell the staff person they usually report to so other assistance can be arranged.

Honest Answers

Point out that the surveys ask some questions that are personal, like whether the person feels less lonely and has close ties to people. Survey helpers should keep in mind that clients and caregivers may not feel comfortable being completely honest. Without honest answers, the survey data is not going to provide a true picture of what is happening.

Ask participants for ideas about how they would try to make a client or caregiver feel more comfortable. After they give their ideas, show slide 8.

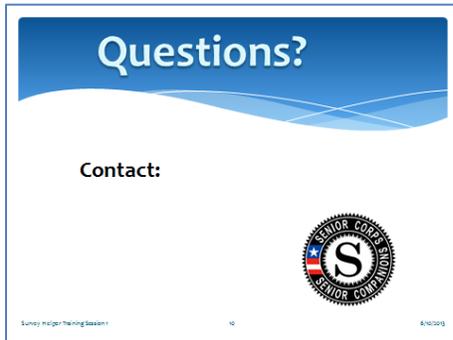


Add these points to their suggestions:

- Survey helpers can reassure the person by telling him/her that honest answers are what matter. No one is judging them. They are not being asked to do the survey to make the [agency or project] look good, and no one will know who their Senior Companion is because there are no names on the surveys. There are no right or wrong answers.
- The survey helper can leave the room while the person fills out the survey or pick it up later.
- The survey helper can also remind the client or caregiver that:
 - The survey is voluntary and does not affect their access to services in any way.
 - No names are on the survey.
 - Their answers will be combined with everyone else's and no one will see their individual answers.
 - Their answers are confidential.
 - The completed survey will go into a sealed envelope.
 - The survey can be mailed if they prefer.

Closing

Ask if anyone has any final questions. (Show slide 9. You may want to add contact information for the person who will answer any future questions to the slide.)



Remind them to talk to the staff person they usually report to about any questions they have in the future.

Pass out any materials, if ready, such as copies of the surveys and envelopes.

Exercise Worksheet: QUESTIONS ABOUT THE SURVEYS

Instructions: You have just completed a survey, and here are more questions! With a partner, discuss and then write down your thoughts below. You do not need to turn this in, but be ready to discuss.

1. Which Survey did you do?

*Senior Companion Program **Independent Living** Performance Measure Survey*
(this one is for clients)

*Senior Companion Program **Respite** Performance Measure Survey* (this one is for caregivers)

Thinking about the people you serve (clients or caregivers)...

2. a. Do you think they would have any questions, or difficulty doing this survey?

Yes No

b. If YES, please explain.

3. Do you have any other thoughts about the survey? Do you see other things that concern you?

Survey Helper Training Session 2: Giving the Survey to Clients/Caregivers in an Interview Format

Introduction

This is an approximately one-hour session for survey helpers who will be giving the survey to clients and caregivers in an interview format. This training is intended as a supplement to the previous training that introduces survey helpers to the surveys and their role as helpers, “Survey Helper Training Session 1: Giving the Survey to Clients/Caregivers to do on Their Own.” “Interview format” means reading survey questions and answer choices to the client/caregiver, and marking down the answers the client/caregiver chooses. Survey helpers would not be choosing answers for the client or caregiver.⁷

An interview format would be used to:

- Assist clients and caregivers who would have difficulty filling out a survey on their own because of low literacy or vision, for example;
- Give the survey to a client or caregiver over the telephone; or
- Give the survey to a client or caregiver in person using a mobile device, where the survey helper marks down their answers into a survey form online.

This session is primarily aimed at survey helpers who will meet with the client or caregiver in person. For additional information on preparing survey helpers to give the survey over the telephone, see Appendix J.

This session does not provide instructions on using a mobile device. If survey helpers will be using a mobile device to enter survey answers onto an online form, schedule some additional time to demonstrate how to access the survey and complete the online form.

Note that Senior Companion volunteers should never interview their own clients and caregivers, although they may assist other volunteers’ clients and caregivers.

Depending on how you are giving out the survey, and how many clients or caregivers may need the survey read to them, you need only train a small group of staff/volunteers for this task. This group should be motivated and able to complete the tasks as instructed, and be familiar with the surveys.

This session may be used “as is” or adapted to fit your needs.

⁷ If clients are unable to complete a survey, a family member or caseworker can do the survey for them. For example, a client with severe cognitive impairment could have a close family member complete the survey, if available. Survey helpers would not do a survey for a client.

Learning Objectives

By the end of the session, participants will:

- Understand the steps involved in giving the survey to clients and caregivers, including how to protect confidentiality;
- Be able to help clients and caregivers feel comfortable and give honest answers; and
- Be able to read survey questions in a natural and neutral way that will not bias their answers.

Materials

Optional PowerPoint slides with abbreviated notes are available to use with this presentation at <http://www.nationalservice.gov/resources/scp-surveys>.

Participants will need a copy of the *SCP Independent Living Performance Measure Survey* and each of the following handouts:

- *Survey Helper Instructions for Interviewing Clients/Caregivers*
- *Exercise Worksheet: Survey Helper Practice*
- *Tips for Reading the Survey*

These [handouts](#) are included on pages 35-37. Participants should also have their *Survey Helper Packets* (from session 1) handy.

This symbol  will cue you as to when to give out the handouts during the session.

Sample Agenda: Session 2

Below is a sample agenda with estimated times for each section.

This is only one way to prepare staff and/or volunteers to be survey helpers. Revise the session to fit the needs of your audience.

Activity	Estimated Time	Method	Slide # (optional)
Welcome	5 min.		1
Learning Objectives		Lecture	2
Interviewing Clients and Caregivers	15 min.		3
<ul style="list-style-type: none"> • What is an Interview Format? • Honest Answers • Survey Helper Instructions  <i>Survey Helper Instructions for Interviewing Clients/Caregivers</i>		Lecture; large group discussion	4-6
Exercise : Survey Helper Role Play	40 min.		
 <i>Exercise Worksheet: Survey Helper Practice</i>  <i>SCP Independent Living Performance Measure Survey</i>  <i>Tips for Reading the Survey</i>		Role play in pairs; Large group debrief	7
Closing	5 min.		8
Final questions		Large group discussion	

Facilitator Notes

Welcome

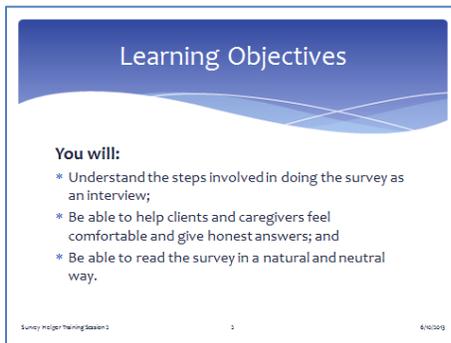
Welcome participants to the training. (Show slide 1.)



Explain that this will be an extension of the previous training that introduced them to the surveys and the survey helper role. This session will focus on how to give clients and caregivers the survey in an interview format.

Learning Objectives

Describe the learning objectives. (Show slide 2.)



By the end of the session, you will:

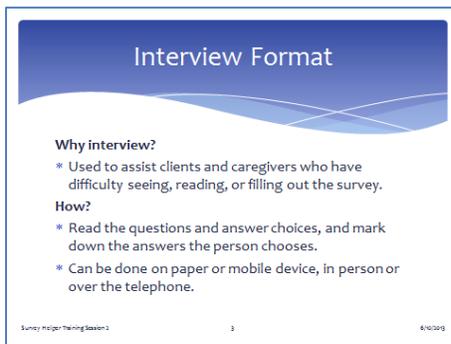
- Understand the steps involved in giving the survey to clients and caregivers as an interview;
- Be able to help clients and caregivers feel comfortable and give honest answers; and
- Be able to read survey questions in a natural and neutral way that will not bias answers.

Tell participants when they would be collecting surveys, and how many. For example, “We have 22 clients and two caregivers that will need someone to read the survey to them. We hope that each of you can give the survey to about five people over the next two weeks. We will work with you to schedule the times in advance.”

Interviewing Clients and Caregivers

What is an Interview Format?

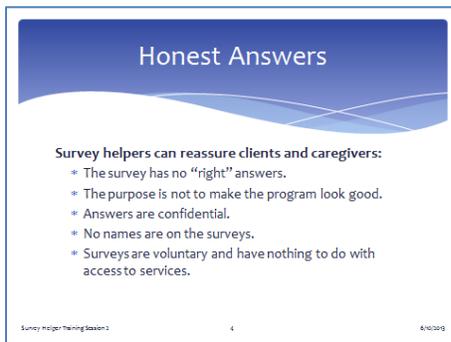
What do we mean by an interview format? (Show slide 3.)



Tell participants that an **interview format** involves reading the questions and answer choices to the client or caregiver, and marking down their responses. An interview format would be used for clients and caregivers who need assistance to complete the survey because they have difficulty seeing, reading, or writing. It would also be used if the survey helper was going to give the survey over the telephone, or input the answers into an online survey on a mobile device.

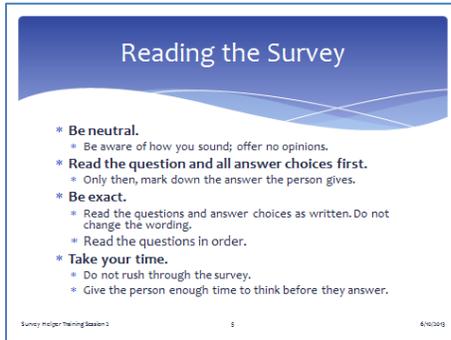
Honest Answers

Remind participants that the surveys ask some questions that are personal. When survey helpers read the questions, they should keep in mind that clients and caregivers may not feel comfortable being completely honest. (Show slide 4.)



Survey helpers can reassure the person by telling him/her that honest answers are what matter. No one is judging them. They are not being asked to do the survey to make the agency or project look good or to make the Senior Companion look good. There are no right or wrong answers.

Tell participants that another reason the clients or caregivers might not give honest answers is if they feel they are supposed to answer one way or another. Survey helpers could accidentally give this impression simply by the way they read the questions. (Show slide 5.)



To prevent this, the survey helper will need to:

- Read in a neutral manner, and do not offer opinions even if asked.
- Read the questions and all answer choices first, and then mark the client or caregiver's answers.
- Read the questions and answer choices exactly as written, and in the order they are written.
- Be careful not to rush through the survey, and allow the client or caregiver enough time to think about a response.

Give an example of a reworded question or answer choice so participants understand what NOT to do. An example will help them understand how rewording a question might change the meaning and influence the person's answer ("Would you say you are getting to the doctor enough these days?" instead of "Because of the Senior Companion Volunteer, I am able to get to medical appointments").

Give an exaggerated example of how *not* to read a question or answer choice so they understand how this might influence a person's answer ("Would you say **YOU** strongly disagree, somewhat disagree, Somewhat Agree, or **STRONGLY AGREE!**?"). Then, read the same question in a neutral tone.

Last, remind participants that the survey is confidential: “As a survey helper, you will know the person’s name and hear their answers. Please respect their privacy and do not discuss the interviews with anyone.”

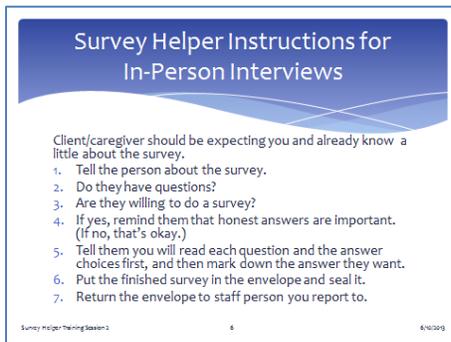
TIP: Keep the training interactive. For example, before you move on to a new topic, call out a question to the large group that gets them thinking about it. (“What else might affect how a client or caregiver answers a question?”) Often they will have ideas that anticipate your next point. Reinforce the information presented: “What would you do if a client asks you what they should say?” “What do you think about ...” This also promotes discussion and peer learning.

Survey Helper Instructions



Give everyone a copy of the *Survey Helper Instructions for Interviewing Clients/Caregivers*.

(Show slide 6.)



Read through each step and make sure everyone understands the procedures. Remind participants that they should use the *Survey Fact Sheet* in the *Survey Helper Packet* they received during the session 1 training to introduce the survey to clients/caregivers and answer their questions.

Give participants as much information about the interviews as you can at this point. For example, tell them:

- Whether most interviews will be with clients or caregivers;
- What to expect as far as the types of limitations clients/caregivers have (vision, literacy);
- Who will schedule the meetings or telephone calls with clients/caregivers and when;
- What will this person tell the client/caregiver about the survey; and
- When you hope the interviews can happen.

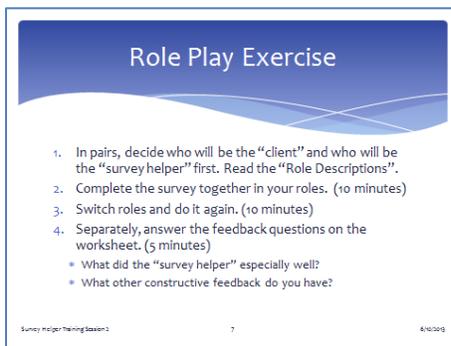
Exercise: Survey Helper Role Play

The purpose of this role play exercise is to get participants comfortable with assisting clients and caregivers with a survey. The exercise will take about 40 minutes in total, and everyone should get a chance to be the “survey helper”.

You will need the following three handouts, one for each participant:

- *Exercise Worksheet: Survey Helper Practice*
- *SCP Independent Living Performance Measure Survey*
- *Tips for Reading the Survey*

(Show slide 7.)



Instructions:

1.  Give everyone a copy of the first two handouts: *Exercise Worksheet: Survey Helper Practice* and *SCP Independent Living Performance Measure Survey*.
2. Invite participants to get into pairs. Let them know that everyone will get a chance to practice giving the survey with a partner.
3. Each pair should choose who will be the “survey helper” and who will be the “client” for the first role play practice.
4. Read the “Role Descriptions” on the worksheet to the group.
5. Ask the pairs to do the survey together, in their roles. This should take about 10 minutes.
6. After they have finished the survey, ask them to switch roles and do it again. After 10 minutes, ask everyone to stop.
7. Have them take a few minutes to individually answer the “Feedback” questions on their worksheets.

Debrief:

Use this debrief time (about 15 minutes) to reinforce good practices.

1. Call the group together and ask them to refer to their notes on the worksheet.
2. Ask what they thought their partner did especially well as the survey helper (question 1).
3. Ask for a show of hands on question 2: “How many understood all the questions and answer choices when you heard the survey helper read them?” For those who did understand everything, ask them to describe how the survey helper read that was helpful. For those who didn’t understand everything, ask them what might have made it easier.
4. Go through questions 3 and 4 in a similar way, encouraging useful feedback from the group.
5. If there is time, ask the survey helpers if they thought the experience was easier or more difficult than they thought it would be.

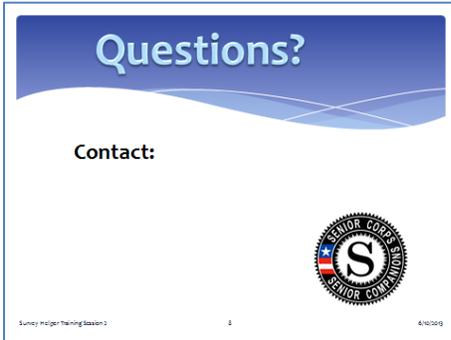


Give everyone a copy of the handout, *Tips for Reading the Survey*. Encourage them to jot down additional tips they want to remember from the discussion today. Use the tips in the handout to reinforce points made during the discussion.

TIP: Reinforce peer learning. Write participants’ good ideas on an easel pad when you do a “debrief” discussion. This helps people remember important points and encourages them to share practical suggestions.

Closing

Be sure to ask if anyone has any final questions. (Show slide 8. You may want to add contact information for the person who will answer any future questions to the slide.)



Remind participants to talk to the staff person they usually report to about any questions they have in the future. If possible, offer to do more role plays for anyone who wants more practice, or encourage the participants to get together and practice.

Survey Helper Instructions for Interviewing Clients/Caregivers

Below are instructions for assisting clients/caregivers to do the survey by reading the questions and marking down their answers. Ideally, the client or caregiver will be expecting you when you arrive.

You will need:

- a copy of the survey
- an envelope; and,
- a pencil or pen.

1. Tell the client or caregiver about the survey by reading “Introduce the Survey” from the *Survey Fact Sheet* in the *Survey Helper Packet*.
2. Ask if he/she has any questions. (If yes, give the answers that are on the *Survey Fact Sheet*.)
3. Ask if he/she is willing to do the survey. You can ask if they would like to see the survey first.

If yes, continue.

If no, that’s okay. At this point, you are done. Let the staff person you usually report to know that they decided not to do the survey.

4. Tell the client/caregiver that honest answers are most important. “We are not doing the survey to make [agency or project name] look good, and no one will know who your Senior Companion is because there are no names on the survey. We are looking for honest answers.”
5. Tell them what you will do (“I will read each question and the answer options first, and then mark down the answer you say”), and then go through the survey.
6. When the survey is finished, put it into the envelope and seal it. Remind the client/caregiver that their responses are confidential and you will not share them with anyone.
7. Return the sealed envelope to the staff person you report to.

Exercise Worksheet: SURVEY HELPER PRACTICE

Instructions

1. Decide who will be the Survey Helper and who will be the Client first.
2. Read the “Role Descriptions” below, and complete the survey together.
3. Switch roles and do it again.
4. When you have finished, answer the “Feedback” questions.

Role Descriptions

Survey Helper: You will need to:

- tell the Client about the survey;
- answer any questions as best you can; and,
- assist with the survey by reading the questions and marking their answers.

Client: You are surprised to hear about this new and interesting survey! You are willing to do the survey, but you might have a few questions first.

Feedback: Think about how you felt when you were the Client or Caregiver hearing the survey...

1. What did the Survey Helper do that worked especially well? _____

2. Did you understand the questions and answer choices when you heard the Survey Helper read them? Yes No

If no, what would have helped you? _____

3. Did the survey feel like it was moving at a comfortable pace?
Just right Too slow Too fast

4. Did you ever feel like the Survey Helper wanted you to answer a question in a certain way? Yes No

If yes, why did it seem like that? _____

Tips for Reading the Survey

- Read the entire question and answer choices first, and then mark down the client/caregiver's response.
- Ask questions as they are written, and in the same order. Do not put questions into your own words.
- Do not skip questions.
- Be aware of how you sound. Read clearly so you are understood.
- Read in a neutral manner so the person doesn't think they are supposed to answer one way or another.
- Do not offer your opinion about the survey.
- Do not suggest an answer. This is tempting to do when someone is slow to answer, but give them time.
- Take your time. Move through the survey at a pace that seems comfortable.
- Use your best judgment. If you think the client/caregiver is getting frustrated or having trouble understanding the questions, stop the survey as if it were finished. Tell the staff person you report to what happened later.

Notes:

Appendix A. Survey Fact Sheet

Senior Companion Program Independent Living Performance Measure Survey ***Senior Companion Program Respite Performance Measure Survey***

SURVEY FACT SHEET

This *Survey Fact Sheet* can be used to introduce the surveys in person to clients, caregivers, and family members who will complete a survey for a client, and answer questions that they may have.

Introduction for Clients and Caregivers

The Senior Companion Program is asking people who use their services to take a short survey measuring how having a Senior Companion has affected their life. Your participation is voluntary. You can choose not to take the survey. Your access to a Senior Companion will not be affected.

If you choose to take the survey, you can skip any questions you don't want to answer. If a question doesn't apply, just leave it blank. Do not put your name on the survey. The survey is confidential and results will only be reported in summary form with everyone's answers combined.

Introduction for Family Member (if needed to complete the survey for a client)

The Senior Companion Program is asking people who use their services to take a short survey. They would like to know how having a Senior Companion has affected their clients' lives. Would you be willing to take the survey for your family member? Participation is voluntary. You can choose not to take the survey. Your family member's access to a Senior Companion will not be affected.

If you choose to take the survey, you will need to answer the way you believe your family member would answer. You can skip any questions you don't want to answer. If a question doesn't apply, or you are unsure of how your family member would feel about it, just leave it blank. Do not put your name on the survey. The survey is confidential and results will only be reported in summary form with everyone's answers combined.

Would you be willing to take the survey for your family member?

Questions

Why am I being asked to do this survey? The Senior Companion Program wants to learn how this support may affect a person's life, and how to improve services.

What does the survey ask? What is the survey about? The survey asks questions about aspects of your daily life. [Offer client or caregiver an opportunity to look at the survey before deciding whether to participate.]

Do I have to do the survey? No, the survey is voluntary, and your access to a Senior Companion will not be affected if you choose not to take the survey.

Can I choose not to answer some of the questions? Yes, you can leave any question blank.

What if a question does not apply to my situation? You can leave that question blank.

Who will see my answers? The director of our Senior Companion program will put all responses together. No names are on the surveys, so no one will know who did which survey.

Can you fill it out for me? No, the questions ask about your life and how you feel.

Can someone else fill it out for me? (clients) Yes, if you are unable to fill out a survey, a family member can fill out the survey for you.

Can my Senior Companion help me fill it out? No, but someone else from the Senior Companion Program can help. If you would like some help, someone from [the project/agency] will contact you.

What does this question (or word) mean? There is not one "correct" meaning. Just respond based on whatever it means to you.

The hours my Senior Companion visits are not the same every time. How do I answer question #1? Think about a typical week. About how many hours does the Companion visit in a typical week?

**Appendix B. Senior Companion Program Independent Living Performance
Measure Survey (Sample)**

(Next page)

**SENIOR COMPANION PROGRAM
INDEPENDENT LIVING PERFORMANCE MEASURE SURVEY**

Thank you for taking the time to complete this survey. We would like to know how the Senior Companion Volunteer who has been assisting you has affected your life.

All information will be kept confidential; please do not disclose your name. You may choose not to answer questions.

This 1st question is about how many hours of service you receive in a typical week from your senior companion.

Tell us how many TOTAL HOURS in a typical week you received services.

Here is an example of how Mrs. Jones would answer question #1:

Her Senior Companion usually spends one hour on Monday with Mrs. Jones and two hours on Wednesday. Therefore, the total hours a week that she receives services is 3 hours a week.

1. In a typical week, my Senior Companion Volunteer is with me for

hours

Please turn the page for the questions 2-13

**SENIOR COMPANION PROGRAM
INDEPENDENT LIVING PERFORMANCE MEASURE SURVEY**

Because I Have a Senior Companion Volunteer ...

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
2) ... I feel less lonely.	1	2	3	4
3) ... I feel I have close ties to more people.	1	2	3	4
4) ... I am able to do more of the things I <u>need</u> to do.	1	2	3	4
5) ... I am able to do more of the things I <u>want</u> to do.	1	2	3	4
6) ... I can remain living in my own home.	1	2	3	4
7) ... I am eating regularly scheduled meals.	1	2	3	4
8) ... I am able to get to medical appointments.	1	2	3	4
9) ... I am able to get to the grocery store	1	2	3	4
10) ... I am able to take care of other necessary errands/appointments.	1	2	3	4
11) ... I am more satisfied with my life.	1	2	3	4
12) Overall, I am satisfied with my Senior Companion volunteer.	1	2	3	4
13) Overall, the Senior Companion Program has met my expectations.	1	2	3	4

Appendix C. Senior Companion Program Independent Living Performance Measure Survey - Completed Example

(Next page)

**SENIOR COMPANION PROGRAM
INDEPENDENT LIVING PERFORMANCE MEASURE SURVEY**

EXAMPLE

Thank you for taking the time to complete this survey. We would like to know how the Senior Companion Volunteer who has been assisting you has affected your life.

All information will be kept confidential; please do not disclose your name. You may choose not to answer questions.

This 1st question is about how many hours of service you receive in a typical week from your senior companion.

Tell us how many TOTAL HOURS in a typical week you received services.

Here is an example of how Mrs. Jones would answer question #1:

Her Senior Companion usually spends one hour on Monday with Mrs. Jones and two hours on Wednesday. Therefore, the total hours a week that she receives services is 3 hours a week.

1. In a typical week, my Senior Companion Volunteer is with me for

6 hours

Please turn the page for the questions 2-13

**SENIOR COMPANION PROGRAM
INDEPENDENT LIVING PERFORMANCE MEASURE SURVEY**

EXAMPLE

Because I Have a Senior Companion Volunteer ...

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
2) ... I feel less lonely.	1	2	3	4
3) ... I feel I have close ties to more people.	1	2	3	4
4) ... I am able to do more of the things I <u>need</u> to do.	1	2	3	4
5) ... I am able to do more of the things I <u>want</u> to do.	1	2	3	4
6) ... I can remain living in my own home.	1	2	3	4
7) ... I am eating regularly scheduled meals.	1	2	3	4
8) ... I am able to get to medical appointments.	1	2	3	4
9) ... I am able to get to the grocery store	1	2	3	4
10) ... I am able to take care of other necessary errands/appointments.	1	2	3	4
11) ... I am more satisfied with my life.	1	2	3	4
12) Overall, I am satisfied with my Senior Companion volunteer.	1	2	3	4
13) Overall, the Senior Companion Program has met my expectations.	1	2	3	4

Appendix D. Senior Companion Program Respite Performance Measure Survey (Sample)

(Next page)

**SENIOR COMPANION PROGRAM
RESPITE PERFORMANCE MEASURE SURVEY**

Thank you for taking the time to complete this survey. We would like to know how the Senior Companion Volunteer who has been providing respite care to you has affected your life (as the caregiver).

All information will be kept confidential; please do not disclose your name. You may choose not to answer questions.

This 1st question is about how many hours of respite service you receive in a typical week from your senior companion.

Tell us how many TOTAL HOURS in a typical week you received respite services.

Here is an example of how Mrs. Smith (the caregiver) would answer question #1:

Her Senior Companion usually provides respite care by spending time with the person in Mrs. Smith's care. The Senior Companion comes to the home for one hour on Monday and two hours on Wednesday. Therefore, the total hours a week that Mrs. Smith receives respite services is 3 hours a week.

1. In a typical week, how many hours does your Senior Companion Volunteer provide respite services?

**hours
of respite**

Please turn the page for questions 2-12

**SENIOR COMPANION PROGRAM
RESPITE PERFORMANCE MEASURE SURVEY**

Because I Have a Senior Companion Volunteer assisting with Respite Care ...

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
2) ... I feel less lonely.	1	2	3	4
3) ... I feel I have close ties to more people.	1	2	3	4
4) ... I am able to do more of the things I <u>need</u> to do.	1	2	3	4
5) ... I am able to do more of the things I <u>want</u> to do.	1	2	3	4
6) ... I am able to get short-term rest and relief.	1	2	3	4
7) ... I am able to find time to run errands.	1	2	3	4
8) ... I am able find time to attend to my personal and health care needs.	1	2	3	4
9) ... I am more satisfied with my life.	1	2	3	4
10) ... The person I care for is able to remain at home.	1	2	3	4
11) Overall, I am satisfied with the Caregiver Respite Senior Companion volunteer.	1	2	3	4
12) Overall, the Senior Companion Program has met my expectations.	1	2	3	4

Appendix E. Senior Companion Program Respite Performance Measure Survey - Completed Example

(Next page)

**SENIOR COMPANION PROGRAM
RESPITE PERFORMANCE MEASURE SURVEY**

EXAMPLE

Thank you for taking the time to complete this survey. We would like to know how the Senior Companion Volunteer who has been providing respite care to you has affected your life (as the caregiver).

All information will be kept confidential; please do not disclose your name. You may choose not to answer questions.

This 1st question is about how many hours of respite service you receive in a typical week from your senior companion.

Tell us how many TOTAL HOURS in a typical week you received respite services.

Here is an example of how Mrs. Smith (the caregiver) would answer question #1:

Her Senior Companion usually provides respite care by spending time with the person in Mrs. Smith's care. The Senior Companion comes to the home for one hour on Monday and two hours on Wednesday. Therefore, the total hours a week that Mrs. Smith receives respite services is 3 hours a week.

1. In a typical week, how many hours does your Senior Companion Volunteer provide respite services?	<input type="checkbox"/> 1 hours <input checked="" type="checkbox"/> 2 hours <input type="checkbox"/> 3 hours <input type="checkbox"/> 4 hours <input type="checkbox"/> 5 hours of respite
-----------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Please turn the page for questions 2-12

SENIOR COMPANION PROGRAM RESPIRE PERFORMANCE MEASURE SURVEY

EXAMPLE

Because I Have a Senior Companion Volunteer assisting with Respite Care ...

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
2) ... I feel less lonely.	1	2	3	4
3) ... I feel I have close ties to more people.	1	2	3	4
4) ... I am able to do more of the things I <u>need</u> to do.	1	2	3	4
5) ... I am able to do more of the things I <u>want</u> to do.	1	2	3	4
6) ... I am able to get short-term rest and relief.	1	2	3	4
7) ... I am able to find time to run errands.	1	2	3	4
8) ... I am able find time to attend to my personal and health care needs.	1	2	3	4
9) ... I am more satisfied with my life.	1	2	3	4
10) ... The person I care for is able to remain at home.	1	2	3	4
11) Overall, I am satisfied with the Caregiver Respite Senior Companion volunteer.	1	2	3	4
12) Overall, the Senior Companion Program has met my expectations.	1	2	3	4

Appendix F. Talking with Stakeholders

Stakeholders include clients, caregivers, volunteers, your sponsor's Board of Directors, your Advisory Council, program managers and coordinators, in-service facilitators, and volunteer stations. Talk to stakeholders early and keep them informed. Let stakeholders know about the surveys and how they might be asked to assist. Offer to share survey results with them when they become available.

Advisory Board

Let your advisory board know that you are measuring outcomes using these surveys. Here are some "talking points" you may want to use.

- The Corporation for National and Community Service (CNCS) has developed two surveys to learn how the support of a Senior Companion affects a person's life.
- CNCS is asking Senior Companion Program grantees to distribute and collect the surveys from all clients and caregivers who have been receiving services for a minimum amount of time as indicated in our work plan.
- The surveys are short. The client survey asks 12 questions; the caregiver survey asks 13 questions.
- The surveys are mandatory for grantees beginning a new three-year cycle of CNCS funding.
- Client and caregiver participation in the surveys is voluntary. Choosing not to take a survey will not affect access to services.
- Survey data are confidential and no names are collected. Results will be presented in a way that protects individual identities.
- CNCS uses this information to demonstrate the value of national service and to improve Senior Corps Programs.
- It is important to show how our service affects the people we serve. Funders and others are interested in our outcomes.
- More information is available at the National Service Knowledge Network (<http://www.nationalservice.gov/resources>).

Program Managers, Coordinators, and Volunteer Stations

Keep program managers and other staff and partners informed about the surveys. They may get questions from volunteers, clients, or caregivers, or need to share in the data collection responsibilities.

If you will be collecting surveys through several sites or stations, include these partners in the planning as much as possible.

Appendix G. Data Collection Plan & Schedule

You can give the survey to the client or caregiver in any of the following ways:

- In person, by handing a paper form for them to fill out;
- In person or over the telephone, by reading it to them and taking down their answers on paper or on a computer/mobile device using an electronic version of the survey;
- Sending it to them through the mail;
- Emailing them a link to the survey which they would fill out online.

Consider which option is most practical for you and your clients, caregivers, and project resources. You may want to use a combination of options.

Begin by making a list of the clients and a list of the caregivers who should get a survey - people who have been receiving SCP services for the minimum amount of time indicated in your work plan. Then, determine how you will get the survey to them and who might need to be involved.

The steps for each method are listed below. Customize each schedule for your project by adding “due dates.”

Revise the task lists as you see fit. For example, you may want to add a column for “Person Responsible” and share the task list with staff or others working with you, or reorder some of the steps.

*Questions? Call Senior Corps Survey Technical Support at 1-800-207-0750,
or email us at SCSurvey@jbsinternational.com.*

Task List and Schedule for Giving the Survey in Person

Complete by (due date):	IN PERSON SURVEY Tasks (using paper survey)	Check off when completed
	<p>1. Put together lists of the people who should get a survey – one list for clients receiving companionship/independent living services if you are measuring H9, and one list for caregivers receiving respite care services if you are measuring H14. Clients and caregivers who have been receiving services for at least the minimum amount of time indicated in your work plan should get a survey.</p>	<input type="checkbox"/>
	<p>2. Download survey(s) and make copies.</p>	<input type="checkbox"/>
	<p>3. Determine who can give the surveys to clients/caregivers (survey helpers).</p>	<input type="checkbox"/>
	<p>4. Train survey helpers on how to:</p> <ul style="list-style-type: none"> • introduce survey and provide instructions, answer questions; • use sealed envelopes for completed surveys and maintain confidentiality; • return completed surveys; and • record whether surveys were completed or need follow-up. 	<input type="checkbox"/>
	<p>5. (If needed) Train survey helpers to give the survey to client/caregivers by reading the survey and marking their answers (interview format). Senior Companions cannot assist their own clients/caregivers to do the survey in this way. Survey helpers who assist should be staff or volunteers who do not directly serve the clients/caregivers.</p>	<input type="checkbox"/>
	<p>6. Have survey helpers collect surveys.</p>	<input type="checkbox"/>
	<p>7. Collect all surveys from survey helpers and store them in a safe place. Keep them for your records.</p>	<input type="checkbox"/>
	<p>8. Enter survey data into <i>Client-Caregiver Surveys Spreadsheet</i> (recommended) to calculate the results.</p> <p>9. Report your performance measure results (numbers of clients/caregivers who were surveyed and met the target for H9/H14) in eGrants.</p>	<input type="checkbox"/>

Task List and Schedule for Giving the Survey over the Telephone

Complete by (due date):	TELEPHONE SURVEY Tasks (using paper survey)	Check off when completed
	1. Put together lists of the people who should get a survey – one list for clients receiving companionship/independent living services if you are measuring H9, and one list for caregivers receiving respite care services if you are measuring H14. Clients and caregivers who have been receiving services for at least the minimum amount of time indicated in your work plan should get a survey. Include telephone numbers.	<input type="checkbox"/>
	2. Download survey(s) needed and make copies.	<input type="checkbox"/>
	3. Decide when calls will be made and how much time you will need (assume 20 minutes per person).	<input type="checkbox"/>
	4. Decide who will do the interviews (survey helpers).	<input type="checkbox"/>
	5. Train survey helpers on how to: <ul style="list-style-type: none"> • introduce survey and provide instructions, answer questions; • read questions and responses in a neutral manner; • mark answers on the survey form; • maintain confidentiality; • record whether surveys were completed or need follow-up; and • store completed surveys in a safe location. 	<input type="checkbox"/>
	5. Project Director/staff should let clients/caregivers know about the survey in advance and schedule the calls if needed.	<input type="checkbox"/>
	6. Have survey helpers conduct surveys.	<input type="checkbox"/>
	7. Collect all surveys and store them in a safe place. Keep them for your records.	<input type="checkbox"/>
	8. Enter survey data into <i>Client-Caregiver Surveys Spreadsheet</i> (recommended) to calculate the results.	<input type="checkbox"/>
	9. Report your performance measure results (numbers of clients/caregivers who were surveyed and met the target for H9/H14) in eGrants.	<input type="checkbox"/>

Task List and Schedule for Giving the Survey using a Computer/Mobile Device

Trained staff or volunteers who do not serve the clients/caregivers read the questions to clients/caregivers, in person or over the telephone. They use their mobile devices or computers to mark down their answers.

Complete by (due date):	COMPUTER/MOBILE DEVICE SURVEY Tasks (in person or over the telephone)	Check off when completed
	1. Put together lists of the people who should get a survey – one list for clients receiving companionship/independent living services if you are measuring H9, and one list for caregivers receiving respite care services if you are measuring H14. Clients and caregivers who have been receiving services for at least the minimum amount of time indicated in your work plan should get a survey.	<input type="checkbox"/>
	2. Call the Senior Corps Survey Help Desk to get a copy of the survey transferred to your account. You will need a paid account with SurveyMonkey.	<input type="checkbox"/>
	3. Inform clients/caregivers in advance about the survey and what to expect (that is, someone will do a survey with them in person or over the phone).	<input type="checkbox"/>
	4. Train survey helpers to: <ul style="list-style-type: none"> • introduce the survey and answer questions; • read questions and responses in a neutral manner; • complete the online survey form; • maintain confidentiality; and • record whether surveys were completed or need follow-up. 	<input type="checkbox"/>
	5. Have survey helpers give clients/caregivers the survey over the telephone or in person.	<input type="checkbox"/>
	6. Once all surveys you expect to get have been collected, download the data from SurveyMonkey. Keep a copy for your records.	<input type="checkbox"/>
	7. Copy and paste the data into the <i>Client-Caregiver Surveys Spreadsheet</i> (recommended) to calculate the results. Instructions on how to do this are included with the spreadsheet instructions.	<input type="checkbox"/>
	8. Report your performance measure results (numbers of clients/caregivers who were surveyed and met the target for H9/H14) in eGrants.	<input type="checkbox"/>

Task List and Schedule for Mailing the Survey

Complete by (due date):	MAIL SURVEY Tasks	Check off when completed
	1. Put together lists of the people who should get a survey – one list for clients receiving companionship/independent living services if you are measuring H9, and one list for caregivers receiving respite care services if you are measuring H14. Clients and caregivers who have been receiving services for at least the minimum amount of time indicated in your work plan should get a survey. Include mailing addresses.	<input type="checkbox"/>
	2. Download survey(s) needed and make copies.	<input type="checkbox"/>
	3. Write a cover letter explaining the survey or use the sample cover letter in Appendix I and make copies.	<input type="checkbox"/>
	4. Put together the mailing. Each stamped envelope is addressed to the client/caregiver and includes: <ul style="list-style-type: none"> • Cover letter signed by the Project Director; • Blank survey form; and • Self-addressed stamped envelope. 	<input type="checkbox"/>
	5. Mail out the surveys.	<input type="checkbox"/>
	6. Remind clients/caregivers who have not completed the survey to do so (for example, send a general thank you/reminder letter to everyone after about 5 days).	<input type="checkbox"/>
	7. Collect all surveys and store them in a safe place. Keep them for your records.	<input type="checkbox"/>
	8. Enter survey data into <i>Client-Caregiver Surveys Spreadsheet</i> (recommended) to calculate the results.	<input type="checkbox"/>
	9. Report your performance measure results (numbers of clients/caregivers who were surveyed and met the target for H9/H14) in eGrants.	<input type="checkbox"/>

Task List and Schedule for Online Surveys

Complete by (due date):	ONLINE SURVEY Tasks	Check off when completed
	1. Put together lists of the people who should get a survey – one list for clients receiving companionship/independent living services if you are measuring H9, and one list for caregivers receiving respite care services if you are measuring H14. Clients and caregivers who have been receiving services for at least the minimum amount of time indicated in your work plan should get a survey. Include email addresses.	<input type="checkbox"/>
	2. Call the Senior Corps Survey Help Desk to get a copy of the survey transferred to your account. You will need a paid account with SurveyMonkey.	<input type="checkbox"/>
	3. Inform clients/caregivers in advance about the survey and to look for an email with a link to the survey.	<input type="checkbox"/>
	4. Compose an email “cover letter” message.	<input type="checkbox"/>
	5. Email the message with the survey link to clients/caregivers who will do the survey online.	<input type="checkbox"/>
	6. After about 5 days, email a reminder/thank you message to clients/caregivers.	<input type="checkbox"/>
	7. Once all surveys you expect to get have been collected, download the data from SurveyMonkey. Keep a copy for your records.	<input type="checkbox"/>
	8. Copy and paste the data into the <i>Client-Caregiver Surveys Spreadsheet</i> (recommended) to calculate the results. Instructions on how to do this are included with the spreadsheet instructions.	<input type="checkbox"/>
	9. Report your performance measure results (numbers of clients/caregivers who were surveyed and met the target for H9/H14) in eGrants.	<input type="checkbox"/>

Appendix H. Survey Helper Packet

Senior Corps Performance Measure Surveys

Survey Helper Packet

CONTENTS:

Senior Companion Program Independent Living Performance Measure Survey (<i>for clients</i>).....	1
Senior Companion Program Respite Performance Measure Survey (<i>for caregivers</i>)	3
Survey Helper Instructions	5
Survey Fact Sheet	6

**SENIOR COMPANION PROGRAM
INDEPENDENT LIVING PERFORMANCE MEASURE SURVEY**

Survey Helper Packet (pages 1-2): SAMPLE Client Survey

Thank you for taking the time to complete this survey. We would like to know how the Senior Companion Volunteer who has been assisting you has affected your life.

All information will be kept confidential; please do not disclose your name. You may choose not to answer questions.

This 1st question is about how many hours of service you receive in a typical week from your senior companion.

Tell us how many **TOTAL HOURS** in a typical week you received services.

Here is an example of how Mrs. Jones would answer question #1:

Her Senior Companion usually spends one hour on Monday with Mrs. Jones and two hours on Wednesday. Therefore, the total hours a week that she receives services is 3 hours a week.

1. In a typical week, my Senior Companion Volunteer is with me for

hours

Please turn the page for the questions 2-13

**SENIOR COMPANION PROGRAM
INDEPENDENT LIVING PERFORMANCE MEASURE SURVEY**

Because I Have a Senior Companion Volunteer ...

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
2) ... I feel less lonely.	1	2	3	4
3) ... I feel I have close ties to more people.	1	2	3	4
4) ... I am able to do more of the things I <u>need</u> to do.	1	2	3	4
5) ... I am able to do more of the things I <u>want</u> to do.	1	2	3	4
6) ... I can remain living in my own home.	1	2	3	4
7) ... I am eating regularly scheduled meals.	1	2	3	4
8) ... I am able to get to medical appointments.	1	2	3	4
9) ...I am able to get to the grocery store.	1	2	3	4
10) ... I am able to take care of other necessary errands/appointments.	1	2	3	4
11) ... I am more satisfied with my life.	1	2	3	4
12) Overall, I am satisfied with my Senior Companion volunteer.	1	2	3	4
13) Overall, the Senior Companion Program has met my expectations.	1	2	3	4

**SENIOR COMPANION PROGRAM
RESPITE PERFORMANCE MEASURE SURVEY**

Survey Helper Packet (pages 3-4): SAMPLE Caregiver Survey

Thank you for taking the time to complete this survey. We would like to know how the Senior Companion Volunteer who has been providing respite care to you has affected your life (as the caregiver).

All information will be kept confidential; please do not disclose your name. You may choose not to answer questions.

This 1st question is about how many hours of respite service you receive in a typical week from your senior companion.

Tell us how many TOTAL HOURS in a typical week you received respite services.

Here is an example of how Mrs. Smith (the caregiver) would answer question #1:

Her Senior Companion usually provides respite care by spending time with the person in Mrs. Smith's care. The Senior Companion comes to the home for one hour on Monday and two hours on Wednesday. Therefore, the total hours a week that Mrs. Smith receives respite services is 3 hours a week.

1. In a typical week, how many hours does your Senior Companion Volunteer provide respite services?

hours
of respite

Please turn the page for questions 2-12

**SENIOR COMPANION PROGRAM
RESPIRE PERFORMANCE MEASURE SURVEY**

Because I Have a Senior Companion Volunteer assisting with Respite Care ...

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
2) ... I feel less lonely.	1	2	3	4
3) ... I feel I have close ties to more people.	1	2	3	4
4) ... I am able to do more of the things I <u>need</u> to do.	1	2	3	4
5) ... I am able to do more of the things I <u>want</u> to do.	1	2	3	4
6) ... I am able to get short-term rest and relief.	1	2	3	4
7) ... I am able to find time to run errands.	1	2	3	4
8) ... I am able find time to attend to my personal and health care needs.	1	2	3	4
9) ... I am more satisfied with my life.	1	2	3	4
10) ... The person I care for is able to remain at home.	1	2	3	4
11) Overall, I am satisfied with the Caregiver Respite Senior Companion volunteer.	1	2	3	4
12) Overall, the Senior Companion Program has met my expectations.	1	2	3	4

Survey Helper Instructions

These are the instructions for giving out the survey. As always, if you are unsure about something, ask the staff person you report to: [NAME, TELEPHONE NUMBER].

You will need:

- the survey;
- an envelope with the project director's name and agency's address on the front; and
- an extra pencil or pen if the client/caregiver needs one.

1. Tell the client or caregiver about the survey. Do this by reading "Introduce the Survey" from the *Survey Fact Sheet*.

If you were instructed by staff to give the survey to a family member to complete for the client, read the introduction for the family member.

2. Ask if he/she has any questions.

If yes, give the answers that are on the *Survey Fact Sheet*. (If the *Survey Fact Sheet* doesn't have an answer, ask the staff person you usually report to.)

3. Ask if he/she is willing to do the survey. You can ask if they would like to see the survey before deciding to take it.

If yes, give the person the survey and enough time and space to fill it out with privacy. Leave the room if you can. Remind him/her not to put a name on it. Tell the person they can mail it later if they prefer.

If no, that's okay. At this point, you are done.

4. When the survey is finished, ask the person to put it into the envelope and seal it.

5. Return the sealed envelope to the staff person you report to. (If the person did not want to do the survey, return the unused survey and envelope.)

Survey Fact Sheet

Use this Fact Sheet to help you explain the survey and answer questions.

Introduce the Survey to a Client or Caregiver:

The Senior Companion Program is asking people who use their services to take a short survey measuring how having a Senior Companion has affected their life. Your participation is voluntary. You can choose not to take the survey. Your access to a Senior Companion will not be affected.

If you choose to take the survey, you can skip any questions you don't want to answer. If a question doesn't apply, just leave it blank. Do not put your name on the survey. The survey is confidential and results will only be reported in summary form with everyone's answers combined.

Introduce the Survey to a Family Member of the Client (only if instructed by staff):

The Senior Companion Program is asking people who use their services to take a short survey. They would like to know how having a Senior Companion has affected their clients' lives. Would you be willing to take the survey for your family member? Participation is voluntary. You can choose not to take the survey. Your family member's access to a Senior Companion will not be affected.

If you choose to take the survey, you will need to answer the way you believe your family member would answer. You can skip any questions you don't want to answer. If a question doesn't apply, or you are unsure of how your family member would feel about it, just leave it blank. Do not put your name on the survey. The survey is confidential and results will only be reported in summary form with everyone's answers combined.

Would you be willing to take the survey for your family member?

Questions

Why am I being asked to do this survey? The Senior Companion Program wants to learn how this support may affect a person's life, and how to improve services.

What does the survey ask? What is the survey about? The survey asks questions about aspects of your daily life. [Offer client or caregiver an opportunity to look at the survey before deciding whether to participate.]

Do I have to do the survey? No, the survey is voluntary, and your access to a Senior Companion will not be affected if you choose not to take the survey.

Can I choose not to answer some of the questions? Yes, you can leave any question blank.

What if a question does not apply to my situation? You can leave that question blank.

Who will see my answers? The director of our Senior Companion program will put all responses together. No names are on the surveys, so no one will know who did which survey.

Can you fill it out for me? No, the questions ask about your life and how you feel.

Can someone else fill it out for me? (clients) Yes, if you are unable to fill out a survey, a family member can fill out the survey for you.

Can my Senior Companion help me fill it out? No, but someone else from the Senior Companion Program can help. If you would like some help, someone from [the project/agency] will contact you.

What does this question (or word) mean? There is not one "correct" meaning. Just respond based on whatever it means to you.

The hours my Senior Companion visits are not the same every time. How do I answer question #1? Think about a typical week. About how many hours does the Companion visit in a typical week?

Appendix I. Mail Survey Instructions and Sample Cover Letter

Below are the steps for collecting the surveys through the mail, followed by sample cover letters. The letter on page 74 is for a client who will do the *SCP Independent Living Performance Measure Survey*, or a caregiver who will get the *SCP Respite Performance Measure Survey*. The letter on page 75 is for the family member of a client, if you have determined that the client needs someone else (a surrogate) to fill out the survey for him or her.

To mail the survey, you will need:

- Copies of the survey(s);
- Copies of the cover letter;
- Lists of clients'/caregivers' addresses;
- Envelopes and postage for mailing the survey to clients/caregivers; and
- Stamped self-addressed envelopes for getting the completed survey back from clients/caregivers

Mail Survey Steps

Step 1: Put together lists of the people who should get a survey – one list for clients receiving companionship/independent living services if you are measuring H9, and one list for caregivers receiving respite care services if you are measuring H14. Clients and caregivers who have been receiving services for at least the minimum amount of time indicated in your work plan should get a survey.

Step 2: Download survey(s) needed and make a copy for each client/caregiver on the list. The surveys are available at the National Service Knowledge Network (<http://www.nationalservice.gov/resources/scp-surveys>).

Step 3: Write a cover letter explaining the survey and make copies. There is a sample cover letter included in this appendix that you can adapt, and tips for writing your own letter if you prefer.

Step 4: Put together the mailing. Stamp and address each envelope, and put the following inside:

- Cover letter signed by the Project Director;
- Blank survey; and,
- Self-addressed stamped envelope to return the completed survey form to the Project Director.

Step 5: Mail out the surveys.

Step 6: After about 5 days, you may want to send a reminder/thank you message. You will not know who has returned a survey because they are anonymous, so send the message to everyone. For example, you can say:

“Greetings, we recently sent you a survey about the Senior Companion services you receive. If you have already sent the survey back to us, thank you. If you have not sent the survey back, please take a moment to fill it out. If you have any questions, please call ...”

Step 7: As surveys are returned, store them in a safe place. Keep them for your records.

Step 8: Enter survey data into the *Client-Caregiver Surveys Spreadsheet* (recommended). You may want to do this as the surveys come in to save time later and avoid misplacing data.

Step 9: When it comes time to report your performance measure results for H9/H14 in eGrants, the *summary* page of the spreadsheet automatically calculates the numbers of clients/caregivers who were surveyed and who met the outcome targets.

Sample Cover Letter

On the following pages are sample cover letters that can be adapted and mailed to either clients or caregivers (page 74), or a family member (surrogate) who will be completing the survey for a client (page 75). If you prefer to write your own cover letter, here are some tips:

- Use official project/agency stationary with letterhead.
- Keep the letter to one page, easy to read, and a large font size.
- State why the study is important and how the results will be used.
- Let the reader know why they are being asked to do the survey.
- Let the reader know that their participation is voluntary.
- Let the reader know that the survey is confidential and their individual answers will not be shared.
- Remind the reader not to put their name on the survey.
- Include instructions on how to return the survey, and give a “due date”.
- Give your name and telephone number and ask them to call you if they have questions.
- Include a self-addressed stamped envelope.

[Your Agency Letterhead]

Sample Letter for Client or Caregiver

[date]

Dear [client or caregiver name],

A Senior Companion, [name], has been assisting you. We are asking you to complete a survey about the services you receive. The purpose is to learn how the support of a Senior Companion may affect your life. We invite you to share your thoughts by completing the enclosed survey.

You may choose not to do the survey, and this will not affect your access to services.

The survey is confidential. We do not ask for names or other personal information. Survey results will be presented in a way that prevents individual from being identified.

The survey takes about 10 minutes to fill out. Circle one answer for each question. If a question does not apply to you, leave it blank.

Please do not put your name on the survey. When you are finished, return your survey using the enclosed envelope **by [date]**.

If you have any questions about the survey, please call [Project Director] at [telephone].

Sincerely,

[Name and title]

[Your Agency Letterhead]

Sample Letter for Family Member (Surrogate)

[date]

Dear *[family member name]*,

A Senior Companion volunteer *[name]*, has been assisting *[name of family member]*. We are asking you to complete a survey about the services your family member receives. The purpose is to learn how the support of a Senior Companion has affected our clients' lives.

Would you be willing to complete the survey on behalf of your family member?

You may choose not to do the survey, and this will not affect your family member's access to services in any way.

If you choose to take the survey, you will need to answer the questions the way you believe your family member would answer. If a question doesn't apply, or you are unsure of how your family member would feel about it, please leave it blank.

The survey is confidential. We do not ask for names or other personal information. Survey results will be presented in a way that prevents individual from being identified.

The survey takes about 10 minutes to fill out. Circle one answer for each question. If a question does not apply, leave it blank.

Please do not put your name on the survey. When you are finished, send your survey back in the enclosed envelope ***by [date]***.

If you have any questions about the survey, please call *[Project Director]* at *[telephone]*.

Sincerely,

[Name and title]

Appendix J. Telephone Survey Instructions

Below are the main steps for conducting the surveys over the telephone with clients/caregivers, followed by suggestions for preparing survey helpers and written instructions for them. **Note that the person who conducts the survey with the client or caregiver cannot be their Senior Companion.**

To do the survey over the telephone, you will need:

- Paper copies of the survey, or computer/mobile device if you are using the electronic form;
- Telephone numbers of clients/caregivers;
- Survey helpers who have been prepared in advance (use training sessions 1 and 2 included in this information packet);
- Materials for survey helpers (for example, telephone, survey forms, pens/pencils, names/numbers, and written instructions).

Telephone Survey Steps

Step 1: Put together lists of the people who should get a survey – one list for clients receiving companionship/independent living services if you are measuring H9, and one list for caregivers receiving respite care services if you are measuring H14. Clients and caregivers who have been receiving services for at least the minimum time indicated in your work plan should get a survey. Clients/caregivers who will have difficulty answering survey questions over the phone should get the survey another way, or it may be appropriate for a family member or caseworker to do the survey for them.

Step 2: If you are using paper forms, download the surveys you need and make copies. The surveys are available at the National Service Knowledge Network (<http://www.nationalservice.gov/resources/scp-surveys>).

If you would like to use the electronic form, you will need a paid account with SurveyMonkey. Call the Senior Corps Survey Help Desk (800-207-0750) to get a survey transferred to your SurveyMonkey account.

Step 3: Decide when calls will be made and how much time it will take (assume about 20 minutes per person).

Step 4: Decide who will do the interviews. These survey helpers might be staff or volunteers who are not the Senior Companions for the clients/caregivers to be surveyed. They should be able to read, speak, and write clearly; and be willing to do some minor recordkeeping tasks.

If you need to do the survey in a language other than English, remember that the survey helper should also be fluent in that language.

Step 5: Train survey helpers on how to:

- introduce the survey and answer questions;
- maintain confidentiality;
- read questions and responses in a neutral manner;
- record answers on the survey form (paper or online);
- fill out any recordkeeping, such as whether they were able to reach the person; and
- store completed surveys in a safe location.

Suggestions for preparing survey helpers to do the survey over the telephone are included in this appendix. There are also two training sessions in this information packet.

Step 6: Let clients/caregivers know about the survey in advance. This could be a letter or a call from someone at the project office that they know. Consider how you normally deliver announcements to them. Schedule the individual calls in advance, if possible, or give them an approximate time when someone will call.

Step 7: Survey helpers conduct the surveys. Survey helpers will need to note who has completed a survey and who still needs to be called without putting names on the actual completed survey forms. This can be done on a separate tracking sheet for this purpose. (See the *Survey Call Sheet* on page 76 for an example.)

Step 8: As surveys are finished, store them in a safe place. Keep them for your records.

Step 9: If you are using the paper forms, enter survey data into the *Client-Caregiver Surveys Spreadsheet* (recommended). You may want to do this as the surveys are finished so they don't pile up. It should only take a few minutes to enter each survey into the spreadsheet.

If you are using the electronic form, you can download the data and copy and paste it into the *Client-Caregiver Surveys Spreadsheet*.

Step 10: When it comes time to report your performance measure results for H9/H14 in eGrants, you can use the *Client-Caregiver Surveys Spreadsheet* to get the numbers of clients/caregivers who were surveyed and who met the targets.

Preparing Survey Helpers for Telephone Surveys

Below are some suggestions for preparing survey helpers to conduct the survey over the telephone. You may also want to use the *Survey Helper Training Sessions* provided in this Information Packet.

- Give survey helpers a copy of each survey. Point out that there are two surveys: one for clients who receive companionship/independent living services and one for caregivers who receive respite services.
- Give the survey helpers a copy of the *Survey Fact Sheet* (see Appendix A) and review it. This has a scripted introduction and questions clients/caregivers may ask.
- Give survey helpers the name and number of the Project Director or staff person that clients/caregivers can call if they have questions or concerns.
- Emphasize the importance of respecting confidentiality, and how confidentiality will be protected. This means there should be no names on the survey forms, and no discussing the client/caregiver's answers with anyone.
- Walk survey helpers through the surveys and make sure they understand them. Demonstrate how to complete the form for different responses.
- Practice doing the survey with the survey helpers. Give feedback on how to read the questions and responses in a neutral manner, and at a pace that will be comfortable for the client or caregiver.
- Discuss what to do if a client or caregiver seems confused or doesn't understand the questions, and when to stop the survey.
- Give the survey helpers the *Survey Helper Instructions* (next page) and go through them. Practice the scripted parts.
- Show the survey helpers how to do any recordkeeping so the same person isn't accidentally given the survey twice.
- Show the survey helpers what to do with the completed surveys.

Survey Helper Instructions

Below are instructions for conducting the surveys over the telephone. Please remember:

- ***The survey is confidential.*** As a survey helper, you will know the person's name and hear their answers. Please respect their privacy and do not discuss the interviews with anyone.
- ***Do not put the client/caregiver's name on the survey.*** Use the *Survey Call Sheet* (or other paper) for any notes you need to take.

Instructions and Script

Beginning the Call

"Hello. Is (client/caregiver's name) available?"

If YES, continue.

If NO, ask for a better time to reach him/her, and write this time down.

"My name is (name) and I (work/volunteer) at (the Organization/Project). We are doing a survey about Senior Companion services. *(if needed: like when [name of Senior Companion] visits you on [days of the week]* The purpose of the survey is to learn how this service may affect your life. The survey is voluntary and will not affect your access to a Senior Companion. Would you be willing to take a survey?"

If YES, continue.

If NO, thank the person and check "Person declined to participate" on the "Survey Call Sheet" (or other form).

If the person isn't sure, ask if they would prefer to receive the survey by mail, and write this down. Thank the person and end the call.

If the person has questions, refer to the "Survey Fact Sheet" for answers.

“There are 12 questions and the survey will take about 10 minutes. Do you have time to answer the questions now?”

If YES, continue.

If NO, ask for a better time to do the survey, and write this time down.

To begin the survey, say: “Let’s begin the survey. For each question, I will read the question and all the answers options first, and then I will write down the answer you give me. Everything you tell me is confidential. You may choose not to answer questions.” *(Continue to questions and go through the survey.)*

Ending the Call

“Those are all the questions I have for you. Thank you very much for your time. If you have any questions about this survey, you can call (*name of project director*) at (*the Organization Name*).”

Client Survey Call Sheet (Sample)

Clients who receive companionship/independent living services should be given the ***SCP Independent Living Performance Measure Survey***.

Client		Call Attempts			Final Result		
Name	Telephone Number	First attempt	Second attempt	Third attempt	Date Completed	Date Declined	Could not reach after 3 attempts
Example: <i>Mr. John Williams</i>	888-888-8888	Date: <u>6/25/13</u> Time: <u>11am</u>	Date: <u>6/27/13</u> Time: <u>5pm</u>	Date: _____ Time: _____	6/27/13		
		Date: _____ Time: _____	Date: _____ Time: _____	Date: _____ Time: _____			
		Date: _____ Time: _____	Date: _____ Time: _____	Date: _____ Time: _____			
		Date: _____ Time: _____	Date: _____ Time: _____	Date: _____ Time: _____			

Caregiver Call Sheet (Sample)

Caregivers who receive respite services should be given the *SCP Respite Performance Measure Survey*.

Caregiver		Call Attempts			Final Result		
Name	Telephone Number	First attempt	Second attempt	Third attempt	Date Completed	Date Declined	Could not reach after 3 attempts
<i>Example: Mrs. Celia Gomez</i>	999-999-9999	Date: <u>6/25/13</u> Time: <u>11am</u>	Date: <u>6/27/13</u> Time: <u>5pm</u>	Date: _____ Time: _____	6/27/13		
		Date: _____ Time: _____	Date: _____ Time: _____	Date: _____ Time: _____			
		Date: _____ Time: _____	Date: _____ Time: _____	Date: _____ Time: _____			
		Date: _____ Time: _____	Date: _____ Time: _____	Date: _____ Time: _____			

Appendix K. Online Survey Instructions

To do the survey online, you will need a paid account with SurveyMonkey (<http://www.surveymonkey.com>), an electronic survey administration service, and email addresses of clients/caregivers.

Online Survey Steps

Step 1: Put together lists of the people who should get a survey – one list for clients receiving companionship/independent living services if you are measuring H9, and one list for caregivers receiving respite care services if you are measuring H14. Clients and caregivers who have been receiving services for at least the minimum time indicated in your work plan should get a survey.

Step 2: Call the Senior Corps Survey Technical Support (800-207-0750) to get a copy of the survey transferred to your SurveyMonkey account.

Step 3: Inform clients/caregivers in advance about the survey if you can. Let them know when to look for an email message with the survey.

Step 4: Compose an email “cover letter” message (see the sample cover letter in Appendix I for mail surveys). Include contact information for people who have questions about the survey or difficulty accessing it.

Step 5: Email the message with the survey link to clients/caregivers.

Step 6: Caregivers/clients do the survey online, on their own. After about 5 days, email a reminder/thank you message to clients/caregivers.

Step 7: Once all surveys you expect to get have been collected, close the survey and download the data. You may wish to copy and paste it into the *Client-Caregiver Surveys Spreadsheet* (recommended). (See the step-by-step instructions included with the spreadsheet.)

Step 8: When it comes time to report your performance measure results for H9/H14 in eGrants, use *Client-Caregiver Surveys Spreadsheet* to get the numbers of clients/caregivers who completed a survey and met the targets. The numbers are automatically calculated for you in the spreadsheet’s *Summary* sheet.

Appendix L. Survey Tracking Sheets

Client Survey Tracking Sheet (Sample)

If you are measuring **H9**, clients that have been receiving independent living/companionship services for the minimum amount of time (which you indicated in your work plan) should complete the **SCP Independent Living Performance Measure Survey**. This is a sample tracking sheet to help you determine who should get a survey and if you need to follow up. It includes space to note how you gave them the survey (method). It also includes the type of assistance the client needs to complete the survey, if any, and the final result (when the survey was completed; when the person declined; or if the person did not respond to requests).

You do not need to turn in this tracking sheet. Please use it if you find it helpful, and revise it to fit your needs.

Clients receiving independent living/companionship services			Clients to be Surveyed									
			Method (in person, telephone, mail, online)	Language/Assistance (if applicable)						Final Result		
				Survey language needed, if other than English	Type of assistance needed, if applicable (reading/writing only; surrogate)	Surrogate, if needed						
Name or Identification Number	Date client began receiving SCP services	Check (X) if received minimum amount of service	Name			Relationship	Contact Information	Date Completed	Date Declined	No Response: date of last attempt		
<i>Example: 112</i>	<i>2/12/12</i>	<i>X</i>	<i>telephone</i>		<i>surrogate</i>	<i>Jane Smith</i>	<i>daughter</i>	<i>Cell: 999-9999</i>	<i>7/10/13</i>			
<i>Example: 146</i>	<i>5/10/12</i>	<i>X</i>	<i>In person</i>	<i>Spanish</i>					<i>7/12/13</i>			

Caregiver Survey Tracking Sheet (Sample)

If you are measuring **H14**, caregivers that have been receiving respite services for the minimum amount of time (which you indicated in your work plan) should receive the **SCP Respite Performance Measure Survey**. This is a sample tracking sheet to help you determine who should get a survey and if you need to follow up. It includes space to note how you gave them the survey (method). It also includes the type of assistance the caregiver needs to complete the survey, if any, and the final result (when the survey was completed; when the person declined; or if the person did not respond to requests).

You do not need to turn in this tracking sheet. Please use it if you find it helpful, and revise it to fit your needs.

Caregiver receiving respite services			Caregiver to be Surveyed					
			Method (in person, telephone, mail, online)	Language/Assistance (if applicable)		Final Result		
Name or Identification Number	Date caregiver began receiving SCP services	Check (X) if received minimum amount of service		Survey language needed, if other than English	Type of assistance needed, if applicable	Date Completed	Date Declined	No Response: date of last attempt
<i>Example: 022</i>	<i>4/21/12</i>	<i>X</i>	<i>In person</i>	<i>Russian</i>		<i>7/20/13</i>		
<i>Example: 047</i>	<i>4/29/12</i>	<i>X</i>	<i>telephone</i>		<i>Difficulty reading –needs to hear survey instead of reading it</i>	<i>6/30/13</i>		