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
	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.	❑
	2. Download survey(s) and make copies.	❑
	3. Determine who can give the surveys to clients/caregivers (survey helpers).	❑
	4. Train survey helpers on how to: • 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.	❑
	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.**	❑
	6. Have survey helpers collect surveys.	❑
	7. Collect all surveys from survey helpers and store them in a safe place. Keep them for your records.	❑
	8. Enter survey data into *Client-Caregiver Surveys Spreadsheet* (recommended) to calculate the results. 9. Report your performance measure results (numbers of clients/caregivers who were surveyed and met the target for H9/H14) in eGrants.	❑ ❑

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.	❑
	2. Download survey(s) needed and make copies.	❑
	3. Decide when calls will be made and how much time you will need (assume 20 minutes per person).	❑
	4. Decide who will do the interviews (survey helpers).	❑
	5. Train survey helpers on how to: • 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.	❑
	5. Project Director/staff should let clients/caregivers know about the survey in advance and schedule the calls if needed.	❑
	6. Have survey helpers conduct surveys.	❑
	7. Collect all surveys and store them in a safe place. Keep them for your records.	❑
	8. Enter survey data into *Client-Caregiver Surveys Spreadsheet* (recommended) to calculate the results.	❑
	9. Report your performance measure results (numbers of clients/caregivers who were surveyed and met the target for H9/H14) in eGrants.	❑

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.	❑
	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.	❑
	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).	❑
	4. Train survey helpers to: • 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.	❑
	5. Have survey helpers give clients/caregivers the survey over the telephone or in person.	❑
	6. Once all surveys you expect to get have been collected, download the data from SurveyMonkey. Keep a copy for your records.	❑
	7. Copy and paste the data into the *Client-Caregiver Surveys Spreadsheet* (recommended) to calculate the results. Instructions on how to do this are included with the spreadsheet instructions.	❑
	8. Report your performance measure results (numbers of clients/caregivers who were surveyed and met the target for H9/H14) in eGrants.	❑

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.	❑
	2. Download survey(s) needed and make copies.	❑
	3. Write a cover letter explaining the survey or use the sample cover letter in Appendix I and make copies.	❑
	4. Put together the mailing. Each stamped envelope is addressed to the client/caregiver and includes: • Cover letter signed by the Project Director; • Blank survey form; and • Self-addressed stamped envelope.	❑
	5. Mail out the surveys.	❑
	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).	❑
	7. Collect all surveys and store them in a safe place. Keep them for your records.	❑
	8. Enter survey data into *Client-Caregiver Surveys Spreadsheet* (recommended) to calculate the results.	❑
	9. Report your performance measure results (numbers of clients/caregivers who were surveyed and met the target for H9/H14) in eGrants.	❑

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.	❑
	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.	❑
	3. Inform clients/caregivers in advance about the survey and to look for an email with a link to the survey.	❑
	4. Compose an email "cover letter" message.	❑
	5. Email the message with the survey link to clients/caregivers who will do the survey online.	❑
	6. After about 5 days, email a reminder/thank you message to clients/caregivers.	❑
	7. Once all surveys you expect to get have been collected, download the data from SurveyMonkey. Keep a copy for your records.	❑
	8. Copy and paste the data into the *Client-Caregiver Surveys Spreadsheet* (recommended) to calculate the results. Instructions on how to do this are included with the spreadsheet instructions. 9. Report your performance measure results (numbers of clients/caregivers who were surveyed and met the target for H9/H14) in eGrants.	❑ ❑