

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 (www.nationalserviceresources.gov/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:</i> Mrs. Celia Gomez	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: _____			