

## Senior Companion Program Performance Measure Surveys

### Client-Caregiver Surveys Spreadsheet Instructions

**Client Survey:** The *Senior Companion Program Independent Living Performance Measure Survey* measures the Healthy Futures performance measure H9, “Number of homebound or older adults and individuals with disabilities who reported having increased social ties/perceived social support.”

**Caregiver Survey:** The *Senior Companion Program Respite Living Performance Measure Survey* measures the Healthy Futures performance measure H14, “Number of caregivers of homebound or older adults and individuals with disabilities who reported having increased social ties/perceived social support.”

Below are instructions for entering performance measure data for both surveys into the data aggregation tool (*Client-Caregiver Surveys Spreadsheet*). The spreadsheet can be downloaded at <http://www.nationalserviceresources.gov/scp-surveys>.

The spreadsheet automatically calculates the number of clients and caregivers that met the performance measure outcomes; you will need to report these numbers in eGrants. Once you complete the spreadsheet, be sure to keep a copy for your records along with a copy of the completed surveys.

The person who enters the data should have basic knowledge of spreadsheet programs. Although no names are on the surveys, this person should also understand the importance of maintaining confidentiality.

If you have questions about the *Client-Caregiver Surveys Spreadsheet*, please call the Senior Corps Survey Technical Support at 1-800-207-0750 or email us at [SCSurvey@jbsinternational.com](mailto:SCSurvey@jbsinternational.com).

#### DATA ENTRY STEPS

**Step 1:** Collect completed surveys from clients and caregivers.

**Step 2:** Download the *Client-Caregiver Surveys Spreadsheet* and save it to your computer.

**Step 3:** Open the spreadsheet. It contains three sheets that you can see by clicking the tabs at the bottom.

- The “Summary” sheet is where the results are automatically calculated based on data entered in the other sheets. There are also some boxes on this sheet marked in yellow that you need to fill in.
- The “Client Survey” sheet is where you will be entering the data from the *Senior Companion Program Independent Living Performance Measure Survey*.

*A quick note on terms used in these instructions...*

A **code** is the number entered into a cell for the survey response. For example, rather than typing in “strongly agree”, you would enter the code “4”.

Each horizontal **row** contains all the responses for one survey.

Each vertical **column** contains all the responses for a single question.

**Cells** are the individual boxes where you enter the data.

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- The “Caregiver Survey” sheet is where you will enter data from the *Senior Companion Program Respite Performance Measure Survey*.

**Step 4:** Click the “Summary” tab to open this sheet. It is recommended that you fill in the yellow cells for your project records. This includes:

- Your grant number (cell B3).
- The Sponsor, City, and State (cells D3-D5).
- The total number of independent living clients you are serving (cell B4), and the number of independent living clients that received at least the minimum dosage (amount) of service, as indicated in your work plan (cell B5).
- The total number of caregivers you are serving (cell B6), and the number of caregivers that have received at least the minimum dosage of service, as indicated in your work plan (cell B7).
- The number of surveys that were completed in each language for independent living clients (cells B10-B22) and caregivers (C10-22).

**If you used SurveyMonkey, go to page 4. Otherwise, continue to Step 5.**

**Step 5:** If you collected surveys from independent living clients, click the “Client Survey” to enter data.

- For each completed survey, enter the answer to each question in the correct cell. This will always be a number. The number will either be the number of hours served or a code. (See table below).
- The *Client-Caregiver Surveys Spreadsheet* will not allow you to enter a number other than the code. If you accidentally enter an invalid value, you will get an error message. If you receive this message click cancel and enter the correct value.
- If an answer was left blank on the survey, or more than one answer was marked, leave the cell blank on the spreadsheet.

Column/ Question	Client Survey Instructions	Code
<b>A: Survey Mode</b>	<p>Survey mode refers to how the client/surrogate received the survey. Enter the code for the survey.<sup>1</sup></p> <ul style="list-style-type: none"> <li>• “Self-report” means the person filled out the survey, either on paper or on the computer, online.</li> <li>• “Interview” means someone asked the person the questions, in person or over the telephone, and marked the answers that were given.</li> </ul>	<p>1 = Self-report (paper)                      2 = Self-report (online)                      3 = Interview (in-person)                      4 = Interview (phone)</p>
<b>B: Client Identifier</b>	<p>The “client identifier” does not actually identify clients. It is a unique code used to track the numbers of surveys completed. This column is already filled in and you do not need to do anything here.</p>	Not applicable

<sup>1</sup> If the client is not able to complete the survey, a “surrogate”, such as a family member or caseworker, could complete the survey on the client’s behalf.

(Continued)

Column/ Question	Client Survey Instructions	Code
<b>C: Survey question 1</b>	Enter the number of hours the client put in the boxes.	Enter the actual number.
<b>D-O: Survey questions 2-13</b>	These are the questions on the second page of the survey. For each statement, enter the code which matches the response.	1 = "Strongly Disagree" 2 = "Somewhat Disagree" 3 = "Somewhat Agree" 4 = "Strongly Agree"



**Tip:** It may be easier to enter the data by clicking on the "Survey Mode" cell first, and then enter the correct value using the number keys, and then hit the "Tab" key twice to move to the "Service Hours" cell. You can use this method to enter data for all the cells.

**Step 6:** If you collected surveys from caregivers, click the "Caregiver Survey" sheet to enter data. Follow the same instructions as the "Client Survey" sheet.

Column/ Question	Caregiver Survey Instructions	Code
<b>A: Survey Mode</b>	Survey mode refers to how the caregiver received the survey. Enter the code for the survey.	1 = Self-report (paper) 2 = Self-report (online) 3 = Interview (in-person) 4 = Interview (phone)
<b>B: Caregiver identifier</b>	This column is already filled in and you do not need to do anything here.	Not applicable
<b>C: Survey question 1</b>	Enter the number of hours the caregiver put in the boxes.	Enter the actual number.
<b>D-N: Survey questions 2-12</b>	These are the questions on the second page of the survey. For each statement, enter the code which matches the response.	1 = "Strongly Disagree" 2 = "Somewhat Disagree" 3 = "Somewhat Agree" 4 = "Strongly Agree"



**Tip:** Use the Client and Caregiver "Identifier" numbers listed in the spreadsheet to keep track of which surveys have been entered. To do this, write the Identifier number on the corner of each survey before you start entering data. If you are interrupted while entering the data, you will know exactly where you left off by looking at the Identifier number last entered in the spreadsheet.

### Step 7: Report results.

When you are ready to report results in the PPR, use the numbers on the "summary" tab under "Report this number" for performance measures H9 and H14. Save the completed spreadsheet for your project records, along with any other documentation such as completed surveys and client/caregiver lists of people surveyed.

## If you used SurveyMonkey...

If you used SurveyMonkey, your data is already in a spreadsheet. You will need to pull the data from that spreadsheet and copy and paste it into the *Client-Caregiver Surveys Spreadsheet*. Below are the steps. If you did both the Independent Living (Client) Survey and the Respite (Caregiver) Survey, you will need to follow these steps for each survey separately.

### 1. Download the data from SurveyMonkey.

- a. Once you are logged into your account, **select “Analyze Results”** for the survey.
- b. Under “1. Choose Type of Download”, **select “All Responses Collected”**.
- c. Under “2. Choose Format”, **select “Spreadsheet Format”**.<sup>2</sup>
- d. Under “Spreadsheet Format”, in the “Columns” dropdown menu, **select “Condensed”**. In the “Cells” dropdown menu, **select “Numerical Value (1-n)”**.
- e. Choose “Request Download” or email the results to yourself.<sup>3</sup> SurveyMonkey will give you the file in Excel.
- f. Open the Excel file “Sheet\_1” and save it to your computer.

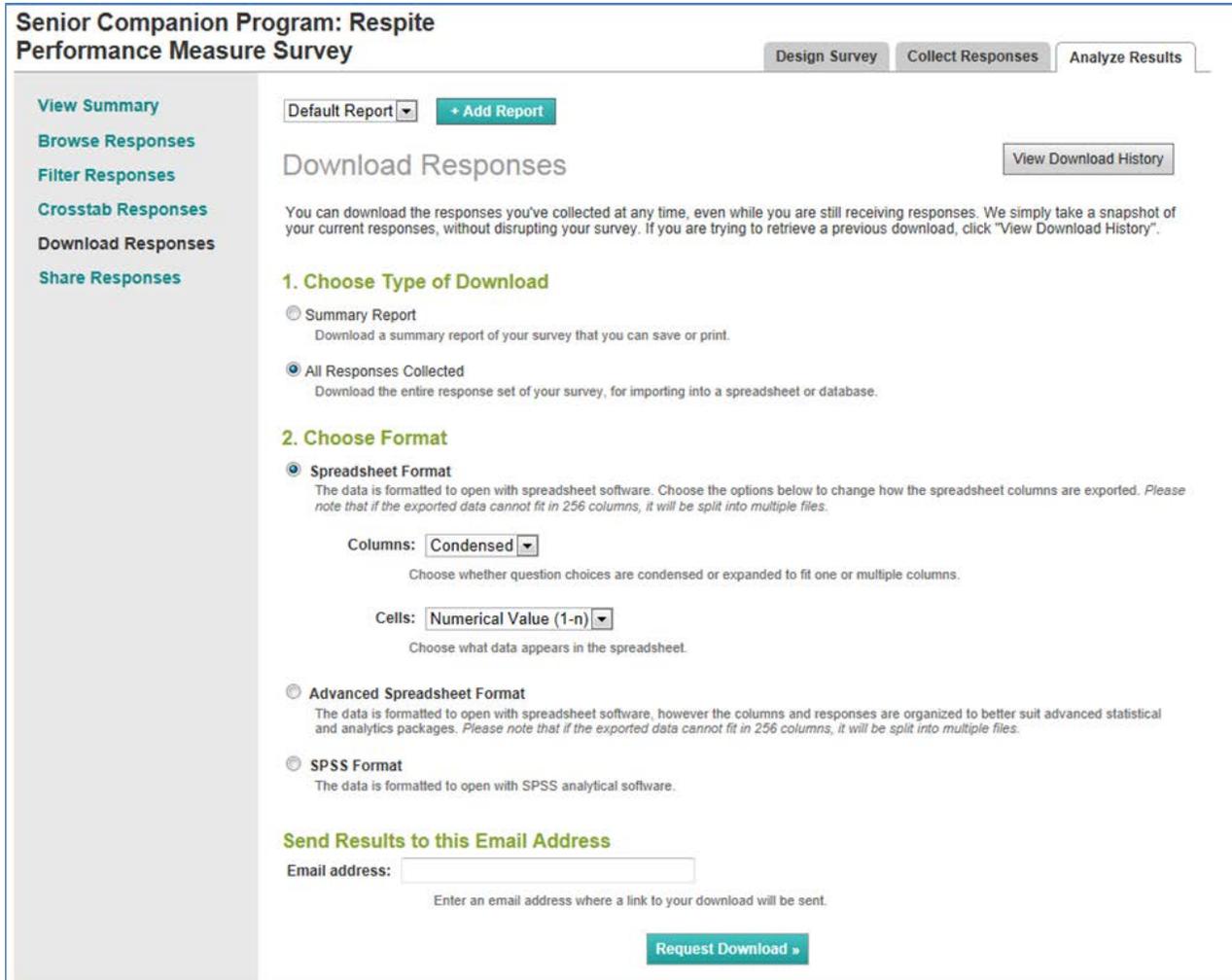
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<sup>2</sup> You can also extract the data in “Summary Report” form, which will give you instant results.

<sup>3</sup> If you choose “download”, refresh your browser if it seems to be taking too long.

## Client-Caregiver Surveys Spreadsheet Instructions

Figure 1: Here are the options to select to get the data from SurveyMonkey.



**2. Open the spreadsheets.** Open the SurveyMonkey Excel spreadsheet and the *Client-Caregiver Surveys Spreadsheet*. To illustrate, Figures 2a and 2b show how the Respite (Caregiver) Survey looks.

Figure 2a: This is what the SurveyMonkey spreadsheet looks like for the Respite Survey, using sample data.

The screenshot shows an Excel spreadsheet with the following data:

	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V		
1	StartDate	EndDate	IP Address	Email Add	First Name	LastName	Custom Di	Open-End Because I Have a Senior Companion Volunteer assisting with Respite Care.													Overall, the S	
2	#####	#####	69.167.77.2					8	2	2	3	2	3	3	3	2	2	3	4	2		
4	#####	#####	69.167.77.2					4	3	3	2	2	2	3	4	4	4	4	4	2		
5	#####	#####	69.167.77.2					12	3	3	3	3	3	2	4	2	1	3	3	3		
6	#####	#####	69.167.77.2					10	4	4	4	4	4	4	3	2	2	3	3	3		
7	#####	#####	69.167.77.2					6	3	2	2	2	3	3	3	3	2	2	3	3		
8	#####	#####	69.167.77.2					6	2	2	4	3	3	2	4	4	4	4	4	4		
9	#####	#####	69.167.77.2					8	2	3	3	2	2	4	3	2	2	3	3	3		
10	#####	#####	69.167.77.2					4	2	3	3	2	3	3	3	3	3	3	3	3		
11	#####	#####	69.167.77.2					4	3	3	3	3	2	3	2	3	4	4	4	4		
12	#####	#####	69.167.77.2					4	3	3	4	3	2	3	3	3	2	4	4	4		
13	#####	#####	69.167.77.2					4	4	4	4	3	2	3	4	4	4	4	4	4		
14	#####	#####	69.167.77.2					8	4	1	4	4	4	3	3	2	3	3	2	2		
15	#####	#####	69.167.77.2					2	2	4	4	3	4	3	3	3	3	3	3	3		
16	#####	#####	69.167.77.2					3	6	4	3	2	4	3	3	4	4	4	3	3		
17	#####	#####	69.167.77.2					3	4	3	4	2	3	3	2	3	3	4	4	4		
18	#####	#####	69.167.77.2					6	4	4	4	4	4	4	3	3	3	2	4	3		

## Client-Caregiver Surveys Spreadsheet Instructions

Figure 2b: This is what the *Client-Caregiver Surveys Spreadsheet* looks like for the Respite Survey, without any data.

**3. Copy the SurveyMonkey data.** Now, select the data (survey answers) in the SurveyMonkey spreadsheet and copy it:

- For the Respite (Caregiver) Survey, select data in columns J-U, starting with row 3.
- For the Independent Living (Client) Survey, select and copy data in columns J-V, starting with row 3.

Do not select the column headers. Only select the cells starting in row 3, beginning with the first question, and including blank cells (cells will be blank if the question was not answered). Ignore columns A-I.

In the Figure 3 example, the cells that you will need to copy have been highlighted in a red box, using the Respite Survey as an example.

Figure 3: Select the cells for the questions, starting with row 3, including blanks, and copy.

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**4. Paste the data into the *Client-Caregiver Surveys Spreadsheet*.** Paste the data you copied in SurveyMonkey into the *Client-Caregiver Surveys Spreadsheet* on the page for that survey (“Client” or “Caregiver”).

- For the Respite (Caregiver) Survey, paste the data into columns C-N, under Questions 1-12.
- For the Independent Living (Client) Survey, paste the data into columns C-O, under Questions 1-13.

Figure 4: Paste the cells into the *Client-Caregiver Surveys Spreadsheet*.

The screenshot shows an Excel spreadsheet with a survey data table. The table has columns for 'Caregiver Identifier', 'Question 1' through 'Question 12', and a 'Result' column. The data rows are labeled CG-0001 through CG-0016. The survey questions are related to the caregiver's experience with a senior companion volunteer.

Caregiver Identifier	Question 1	Question 2	Question 3	Question 4	Question 5	Question 6	Question 7	Question 8	Question 9	Question 10	Question 11	Question 12	Result	
CG-0001	8	2	2	3	2	3	3	3	2	2	3	3	4	NO
CG-0002	4	3	3	2	2	2	2	3	4	4	4	4	2	YES
CG-0003	12	3	3	3	3	3	2	4	2	1	3	3	3	YES
CG-0004	10	4	4	4	4	4	4	3	2	2	3	3	3	YES
CG-0005	6	3	2	2	2	3	3	3	3	2	2	2	3	YES
CG-0006	6	2	4	3	3	2	4	4	4	4	4	4	4	NO
CG-0007	8	2	3	3	2	2	2	4	3	2	2	3	3	YES
CG-0008	4	2	3	3	2	3	3	3	3	3	3	3	3	YES
CG-0009	4	3	3	3	3	2	3	2	3	4	4	4	4	YES
CG-0010	3	3	4	3	2	3	3	3	3	2	4	4	4	YES
CG-0011	4	4	4	4	3	2	3	4	4	4	4	4	4	YES
CG-0012	8	4	1	4	4	4	3	3	2	3	3	3	2	YES
CG-0013	2	2	4	4	3	4	3	3	3	3	3	3	3	YES
CG-0014	3	4	4	3	2	4	3	3	4	4	3	3	3	YES
CG-0015	3	4	3	4	2	3	3	2	3	3	4	4	4	YES
CG-0016	6	4	4	4	4	4	3	3	3	2	4	3	3	YES

If you do it correctly, the *Client-Caregiver Surveys Spreadsheet* will calculate the totals on the “Summary” page for you to report in eGrants.

**5: Report results.**

When you are ready to report results in the PPR, use the numbers on the “summary” tab under “Report this number” for performance measures H9 and H14. Save the completed spreadsheet for your project records, along with any other documentation such as completed surveys and client/caregiver lists of people surveyed.