

### 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.<sup>1</sup>

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.

---

<sup>1</sup> 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*.

SCP Performance Measure Surveys Information Packet

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.