

# Implementing Satisfaction Research In Your Aging-Services Organization

By Lisa Lehman

Fulfillment of mission is at the heart of every not-for-profit aging-services organization. Key elements of mission-driven providers that employ Quality First principles include consumer input, continuous quality improvement, and providing the best care possible. Measuring strengths and identifying where opportunities lie are critical to being successful in these endeavors. Residents, family members and staff play a critical role in this success as well. Conducting consumer and staff satisfaction studies is an excellent way to gather vital information needed to meet consumer and staff expectations and, in turn, take an organization closer to mission fulfillment.

The intent of this paper is to provide organizations the necessary information to implement satisfaction studies and to assess the quality of satisfaction research already underway. Being fully educated about issues such as reliability and validity, respondent confidentiality and the implementation of results is vital to creating an effective, efficient process.

## Getting Started

Launching a satisfaction study from scratch can be a daunting task, but it does not have to be. Here are the 10 basic steps in all high quality satisfaction research.

- Identify your target stakeholder group.
- Clarify your objectives for conducting the research.
- Develop the survey to meet your needs.
- Define your sampling strategy.
- Determine the appropriate data collection approach.
- Assess whether your participation level is adequate.
- Analyze and report your results.

- Share the results with your management team, board, the group you surveyed and appropriate others.
- Determine next steps and action plans.
- Reassess as needed.

## Identify Your Target Group

Many stakeholder groups can provide valuable feedback. Satisfaction surveys often gather input from residents, family members, program participants and staff, but input from other key individuals, such as board members, can be informative as well.

## Clarify Your Objectives

Can you imagine how your organization would function if you did not have a mission statement? Similarly, you must be clear about your expectations and what you hope to garner from your satisfaction study. Fully understanding the objectives will help you ask the right questions and facilitate the survey development process.

## Develop the Right Survey for Your Organization

Survey validity and reliability are critical. Otherwise the feedback you receive will not be an accurate picture of the opinions of the target group. However, validity and reliability are not the only important factors in survey development. It is also important to have a survey that reflects the unique characteristics of your organization. “Cookie cutter” or “one size fits all” surveys may not offer the best approach. Each organization should use a vernacular familiar to its stakeholders and incorporate its name into the survey using specific community names, etc.

Once a draft has been developed, other management personnel should review it as well as consumers and/or staff, particularly if the survey tool is new. This will ensure that questions are clear and meaningful and that the instrument is an appropriate length.

Many surveys comprise a series of Likert-type questions (i.e., 1 through 5 “Excellent” to “Very poor” or “Strongly agree” to “Strongly disagree”) and open-ended questions that allow respondents to provide written comments. The exact length of the scale to use, a 4-point, 5-point or 7-point, is debatable with numerous sources having evaluated the pros and cons of each. As author Arlene Fink suggests, “Conclusive evidence for the superiority of either odd- or even-numbered scales is unavailable. You should use whatever best suits your survey’s needs.”<sup>1</sup>

How long is too long? That answer depends on the stakeholder group being surveyed. For independent/residential living residents and staff, a four- to six-page survey is appropriate and will garner a high level of participation. For home care, adult day, assisted living or skilled nursing residents, a shorter survey approximately three to four pages long is ideal.

Now back to the validity and reliability properties. Validity is defined as “an assessment of how well a survey or index measures what it is intended to measure.” Reliability refers to “the reproducibility or stability of data or observations.”<sup>2</sup> In essence, does the satisfaction survey actually measure satisfaction (*validity*), and does it measure that consistently from one resident to the next and in subsequent studies (*reliability*)?

In its simplest form, the validity of a question can be ascertained by evaluating its specific wording. Higher-level statistical analyses can also be examined to further support the reliability and validity of a survey instrument. If your process is an internal one and your statistical expertise is minimal, focusing on the non-statistical components of your survey psychometrics will have to suffice. However, if partnering with an outside firm, those individuals should be fully prepared to speak to the validity and reliability of your surveys.

There are a few other considerations to contemplate when developing your survey:

- Consider surveys in multiple languages if needed.
- Be sensitive to font sizes with the senior population.
- Ensure the reading level is appropriate.
- Remember that some terminology familiar to management may not be familiar to respondents.

## Define the Sampling Strategy

Should I sample or survey all individuals? That is a common question. The criteria that drive this answer relate primarily to the statistical properties of surveying a random sample rather than an entire population. In many cases, sampling yields high error rates and data with a limited capacity to be generalized to the entire population. A statistician can help you calculate the exact error rates of various sample sizes.

## Determine the Appropriate Data Collection Approach

There is no “one size fits all” approach to data collection. You must determine what works best for your community or program. There are indeed clear pros and cons to various approaches. While some approaches are less costly or intrusive to daily operations, they may have drawbacks such as lower response rates or concerns about respondent confidentiality.

## Written Surveys

When individuals think of satisfaction research, a written survey is often the first approach that comes to mind. It is true that many satisfaction surveys are successfully implemented using written surveys. This approach is not terribly costly, can be easily distributed and collected, and is familiar to survey respondents.

Written surveys work well with staff and with residents who are physically and cognitively capable of completing a survey.

## Telephone Surveys

What if a resident is deemed incapable of completing a written survey? One option is to conduct the survey over the telephone. A strong benefit of telephone surveys is that they consistently yield significantly higher response rates than written surveys, particularly with residents in a nursing home or those receiving home health services. In some cases, it may be necessary to interview a family member who can serve as a proxy report for the consumer. Family members, in particular, are more likely to participate in a telephone survey versus completing a written survey. Other benefits include the ability to clarify misunderstood questions and to probe for comments regarding low ratings. A drawback to utilizing telephone surveys is that they are more costly than written surveys and the labor required to conduct the telephone calls is significant. Contracting with a firm that staffs trained interviewers may be best if this approach is selected.

## Face-to-Face Interviewing

An additional approach to interviewing customers, particularly for those with mild to moderate cognitive or physical impairments, is through in-person interviews. Face-to-face interviews are an effective way of gathering feedback from even those with symptoms of dementia. Prior to the interview, a brief cognitive assessment is often implemented to determine the severity of the impairment and whether the interview will yield valid feedback.<sup>3</sup>

If employing this approach, one of the most significant criteria is to have interviewers who are effectively trained. While this approach may increase the number of consumers who participate, it also requires a significant amount of labor, which results in an added expense. Face-to-face interviews are not necessarily recommended for employee satisfaction surveys, as written surveys consistently yield valid employee feedback with acceptable error rates.

## Online Surveying

A final approach that has increased in popularity is the online, or Web-based, survey. Certainly, the feasibility of implementing a satisfaction survey of this nature is going to vary significantly by respondent group. This approach is not necessarily ideal for resident satisfaction studies, but can be effective for employee satisfaction studies. Your organization must assess not only your staff's comfort level with this approach, but also the capabilities of your organization to provide every staff person with access to a computer.

## Confidentiality

Regardless of how good your survey is, if respondents are not convinced that every effort is being made to maintain the anonymity of their ratings, the feedback is not going to be candid and the response rate will suffer. While costs may be a barrier to partnering with an outside agency, this partnership ensures a significant level of objectivity and can increase respondents' comfort level.

## Assess the Level of Participation

Throughout the data collection phase, it is important to track the level of participation. Achieving a high response rate is critical to the validity of your study. Having an effective communication plan prior to data collection can have a significant, positive impact on participation. Whether the stakeholder group is residents, program participants, family members or staff, a response rate of 70 percent or greater is achievable if using the appropriate methods. If your response rate is lower than anticipated, consider extending the data collection period and increasing communication efforts to reach those who have not participated.

## Analyze the Results

Data entry and analysis of survey results can be labor-intensive and time-consuming. If you are overseeing your process internally, do not underestimate

the amount of time this task will take. The management team and project advisor should determine the statistics that best answer the research objectives of the study.

Regardless of what statistics are calculated, it is important to include a number of basic comparisons when available. One of the inherent objectives of satisfaction research is the ability to measure improvements as well as potential areas of decline. Therefore, when studies have been replicated within a reasonable period of time, it is recommended that study-to-study comparisons be included in the report.

In addition to year-over-year benchmarking, it is valuable to compare your organization's scores against external benchmarks if available. If partnering with an outside firm to conduct your research, those state, national, and/or regional benchmarks should be available. You must fully understand the composition of the firm's databases to ascertain the applicability of the comparisons. A simple review of the client partner list will likely reveal the database characteristics. These firms can also easily share statistics regarding the percentage of for-profit versus not-for-profit, size of the database, the proportion of CCRCs, nursing homes, etc.

Again, when reporting the results, make every effort to ensure that the data are in the aggregate and not a compromise of respondent anonymity.

## *Sharing the Results*

An initial step, once the data are compiled, is to share the results with the management team and board of directors. Soon after the results are shared with appropriate managers, it is important to share the results with those who completed the surveys. One of the worst things an organization can do is to conduct a study and have staff or residents say, "I never heard anything about that survey I filled out. That's the last time I'll fill out one of those satisfaction surveys." Results can be shared in a variety of ways including group presentations, newsletter articles and handouts of study results. A copy of the report should be available for review by those interested in further detail. The exception to this rule relates to the verbatim comments provided on the

surveys. Those comments should be shared only within the executive management team and not distributed openly. Comments can be helpful in clarifying the ratings, but full disclosure can be hurtful and cause more damage than good.

## *Determine the Next Steps*

Interpreting the results, developing action plans and implementing those plans are critical steps in any satisfaction study. After the data have been examined fully, the logical step is to gauge the areas of strength as well as areas of opportunity. Additional input may be required from focus groups or meetings to gain a clear understanding of lower-scoring areas. Select a reasonable number of opportunities to focus upon; selecting too many will cause a loss of focus and an inability to channel efforts effectively. Once this has been accomplished, establish action plans with clear strategies, responsible persons and due dates. Plans may need to be refined as strategies are implemented.

## *Reassess as Needed*

Reassessment will clarify if action plans have been successful. A common question is, "How often should I conduct a survey?" The answer to this question is debatable. The answer is likely found in identifying what works best for your organization. Keep in mind that you must allow enough time to process the results from your previous study, implement the action plans, and allow time for plans to make an impact. It is not unusual for the timeframe from report delivery until implementation of action plans to be several months. Additionally, each organization must evaluate how often its respondents are receptive to being surveyed. You must be cautious about respondent burnout. It is common for organizations to conduct satisfaction surveys annually.

## *Closing Thoughts*

Satisfaction research within aging services is one way for an organization to demonstrate not only its commitment to its stakeholders, but also its commitment to the AAHSA Quality First goals of achieving

excellence and earning public trust. Any competent satisfaction study touches on nearly all of the 10 elements of Quality First.

The benefits to being open to feedback regarding how best to meet one's mission are incalculable. If you've never conducted a satisfaction study or if you have a program that has evolved over many years, the ideas presented here may help to guide and refine your efforts. Commitment comes first. Best of luck as you move forward.

### **Citations**

<sup>1</sup>Fink, A. (2003). How to Ask Survey Questions. Thousand Oaks, CA: Sage Publications, Inc.

<sup>2</sup>Litwin, M. S. (2003). How to Assess and Interpret Survey Psychometrics. Thousand Oaks, CA: Sage Publications, Inc.

<sup>3</sup>Simmons, S. F. & Schnelle, J. F. (2001). The Identification of Residents Capable of Accurately Describing Daily Care: Implications for Evaluating Nursing Home Care Quality. *The Gerontologist*, Vol. 41, No. 5, 605-611.

*The author, Lisa Lehman, is managing partner at Holleran, Lancaster, Pa., [www.holleranconsult.com](http://www.holleranconsult.com), (800) 941-2168.*

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