INFORMATION & ASSISTANCE SATISFACTION SURVEY IMPLEMENTATION INSTRUCTIONS

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This document presents instructions for the AAA personnel who will be administering the Information & Assistance Satisfaction Survey to a sample of callers who have used the agency's Information & Assistance services during March 17, 2003 and May 9, 2003. The AAA personnel administering the survey should adhere to the following procedures and scripts.

Caller Logbook

For those agencies that do not record contact information for every call into the I&A service, this information will have to be recorded for a small percentage of the callers during the collection period. To assist in this task, an example of a daily caller logbook is provided that records the person's name, phone number, date and time of call, I&A operator's name or code, a sequence number to keep track of number of callers, topic of call, preferred call-back time and a refusal column.

We are not asking that information be taken on every call. Instead, we recommend that a random set of callers be asked to leave their name and number for a possible follow-up call. We recommend using sampling time blocks for selecting callers, which will simply involve telling the I&A operator to record information on every caller on a particular day during the specified time period.

Sample List

The survey coordinator should provide the telephone interviewer on a weekly basis with a list of at least 50 I&A callers from the previous week that need to be contacted. This list should be a random sample of callers from the previous week. This list should include at a minimum the caller's name, a unique ID, phone number, date of their I&A call, and the I&A operator who handled the call.

An attempt should be made to contact all callers on the list during the week after their initial call. Some of the persons may have to be called several times in order to reach them. All attempts to contact them should be recorded in the *sample logbook* with the time and date of the attempted call recorded. In addition, the *sample logbook* contains a field called 'Final Result' for reporting issues such as the client moved, has no phone, or that they have completed the questionnaire. Please use the *sample logbook* to record the status of an attempt to contact the client.

At the end of each week, the telephone interviewer should turn in the *sample logbook* for that week to the survey coordinator. After a week, no further attempts will be made to contact the persons on the list. Instead, a new list of I&A callers will be contacted. Thus, for every weekly list it is very important to contact every person on the list within the one week period. By the end of the collection period, there should have been a total of 6 weekly lists.

When calling the client

Introduce yourself by stating who you are and what agency you represent. For example, "Hello, my name is [NAME] and I am calling from the Lower Savanaugh Area Agency on Aging."

If you get the person's voice mail, do not leave a message on their answering machine. Mark this call in the caller logbook as an unsuccessful attempt.

If the client is not at home but someone else answers the phone, just tell the person that you will call the client back. Ask the person if they know when would be a good time to reach the client. Mark this call in the caller logbook as an unsuccessful attempt and record the time to call them back.

If you call and no one answers, mark this in the record & contact form as an unsuccessful attempt. For those clients that may be difficult to reach, make at least five (5) attempts to contact them during different times and on different days before excluding them from further calls. A busy signal does not count as an attempt.

When administering the questionnaire

First read the introduction to the client before proceeding to ask them the questions. You may want to ask if this is a good time for them and call them back later if it is not.

If the I&A caller asks for clarification on a question, please tell them that they should answer the question in terms of what it means to them. Do NOT try to explain what the question means to you.

Immediately after the questionnaire is filled out

- Thank the client for responding.

- In the Office Use Only memo box at the bottom of the first page of the survey, write in the client's ID number, date that the survey was administered, the date that the client had called the I&A service, and the I&A operator who handled the call.

- In the caller logbook, record the 'Final Result' of the call, which hopefully will be a completed questionnaire and not a refusal.

- The completed questionnaires need to be stored in a dedicated folder. On a weekly basis, all questionnaires and a copy of the logbook should be delivered to the AAA survey coordinator for processing. The AAA survey coordinator will be responsible for the data entry process and final storage of all materials related to this effort.