

NYS IL Network 2021 Statewide Consumer Satisfaction Survey Instructions (Methodology)

Overall Design:

Starting in January 2021, each designated center (location) participating in this NY Independent Living (IL) network survey will solicit their Consumer Service Records (CSRs) by utilizing a primary online statewide surveying method to achieve the goal of at least 100 completed surveys or 10% of all active CSRs, whichever is greater. This survey is anonymous, and all responses are confidential.

NYSILC will be in contact with the IL network in the fall of 2020 about survey obligations. Surveying begins in January 2021 with a deadline of May 31, 2021.

The approved primary method allows for the use of a statewide, online survey. In late 2020, centers will be provided with a survey announcement message to email their CSRs, along with a link to the statewide survey. There, survey instructions direct consumers to select their center from a drop-down menu in the first question.

The email message and survey will also be available in Spanish, Chinese, and Russian; NYSILC will work with centers that have alternate language needs, as requested.

For accessibility, this primary method will include a Word document version of the survey attachment with instructions. Survey directions state that anyone taking the survey on behalf of another person should do so from the other person's perspective.

Secondary methods will be allowed to improve outreach of the survey to consumers, especially if response from the primary (email with survey link) method is insufficient. Approved secondary methods include:

- **Direct mail solicitation to consumers from the identified CSR range**
While the mail is sent out to known individuals at known addresses, returned surveys are to be kept confidential. A process must be set up at each center to enter all direct mail survey results into the online statewide survey link. In order to track undeliverable CSRs and encourage participation, centers should mail surveys first class and include a self-addressed stamped envelope.
- **Allowing consumers who are in the identified CSR range to complete the survey at a center computer (with privacy) or with assistance, if requested**
This might include via the phone, relay service, or other requested means. A process must also be set up at each center to input surveys received in an accessible format.

Telephone solicitation has been discouraged by our consultant as being the least confidential method. If utilized, a system must be set up using volunteers not directly connected with staff at the center. For instance, consumers can be directed to a "sister" center whose staff will take the call. Centers could pair up and work with one another. Consumer responses should be directly entered into the online link provided.

A Survey Tracking Form will be provided and utilized by each center to keep track of key numbers related to the process,

NYSILC will follow up with centers after they have met their survey obligations. The exact time frame will depend on the method(s) of implementation. The statewide online survey could take one to two months, with direct mail solicitation adding another two months based on returns (if utilized).

By July 2021, NYSILC will verify results for completeness and send an email to centers and ACCESS-VR to share results and acknowledge survey obligations have been met.

NYSILC will then share the total statewide results with a consultant, who will create a draft report and recommendations for the statewide IL network.

Approved Methods:

The primary approved survey method (use of a statewide, online survey) is outlined below. Centers will satisfy their survey commitment when they have achieved the goal of 100 completed surveys or 10% of CSRs, whichever is greater. This could include making progress toward the goal or exceeding it. The benefit of a statewide online survey as the primary method is auto-tabulation of results, including breakdowns for supportive methods used, demographic information, and trend analysis.

Survey Distribution and List Creation

1. Statewide online survey process: One to two month duration

First, centers need to reference their center-only confidential CSR list (master list). Use the e-mail addresses and names for the individuals identified.

Complete the following steps to send the survey:

Use the Online First Request Letter to compose the e-mail message. The letter will contain a place to insert the link to the Statewide Survey. (NYSILC will send your center this link). Insert the center information, as directed, into the message.

Important: Put the consumer e-mail addresses in the **Blind CC line (BCC)** to protect confidentiality during distribution.

Attach the Word document version of the survey to the e-mail in the event a consumer chooses to fill out the survey in Microsoft Word and return it to the center. When a consumer returns a completed Word survey, the confidential survey results should be given to a staff person who can enter the results via the online survey link.

Once all these components have been assembled, review for completeness and then send out the first online solicitation.

After two weeks, follow up with those consumers who have not yet responded by e-mailing the Online Second Request Letter. This second request e-mail will contain a statement encouraging participation from those who haven't yet taken the survey, while thanking those who have.

Centers should be mindful to avoid assigning staff involved in direct service delivery for these tasks.

Please note: The Online First Request Letter, Second Request Letter, and Word document version of the survey are also available in Spanish, Chinese, and Russian.

- **Survey Solicitation Follow-up:** Go to the [Survey Tracking Form](#) and enter the data for sample size, number of completed surveys, and number of undeliverables for this method. (Undeliverables represent the number of email error messages received back in return).

Secondary Survey Processes

When employing one or more of the secondary methods, centers should separate the CSR master list by the number of methods used. It's important to identify the sample size used for each method and compare that to the number of completed surveys for each method, as well as the number of undeliverable surveys for each method. Centers can and are encouraged to exceed the goal of at least 100 completed surveys, if possible.

2. Direct Mail Solicitation: Two months' duration

When using this method, centers need to reference the center-only confidential list (master list) of CSRs.

Centers will conduct direct mail solicitation using the [Direct Mail Survey Cover Letter](#) to outreach to those consumers identified to be surveyed through this method. Do not send surveys to those consumers who have already completed the survey online or by other methods.

Complete the following steps to conduct the survey:

1. Create a mail listing for all intended recipients on the list, including mailing labels to the consumers and return address labels to the center for the self-addressed stamped envelopes.
2. Create a direct mailing consisting of a [Direct Mail Survey Cover Letter](#) and [Consumer Satisfaction Survey](#), along with a self-addressed stamped envelope, all contained within an outer mailing envelope to each consumer.
3. Create the cover letter based on the [Direct Mail Survey Cover Letter](#) template. Copy over the basic letter, insert the center's logo or letterhead, center information where directed, and the director's name, title, and signature.
4. Once all components for the direct mailing have been assembled, letters should be mailed first class via the post office.
5. Collect all incoming surveys and give to the designated person for entry into the online statewide survey link.
6. Go to the [Survey Tracking Form](#) and enter the data for sample size, number of completed surveys, and number of undeliverables for this method. Undeliverables represent the number of returned mail pieces.

Centers should be mindful to avoid assigning staff who might be involved in direct service delivery for these tasks.

Please note: The [Direct Mail Survey Cover Letter](#) and [Consumer Satisfaction Survey](#) are available in Spanish, Chinese, and Russian. As a center, you may want to determine the best strategy for direct mail use of these materials, as you will need to determine your capacity to read these documents and

facilitate conversations to make them functional. You can choose to include copies in all packets or predict accessible language need based on previous contact with consumers.

Direct Mail Solicitation Follow-Up: Staff/volunteers should be aware of completed surveys mailed back to the center and have a process in place to receive and record them via the online link. This will be important, especially since the direct mail surveys will be coming in over a period of time.

Be mindful of survey mail returned to the center as undeliverable. (This information needs to be collected and submitted with the completed surveys).

When centers have successfully met their survey obligation and completed the data follow-up duties, they should proceed to **the Final Post Survey Instructions** found at the end of this document.

Final Post-Survey Instructions

Once you have completed your survey goal (at least 100 completed surveys or 10% of CSRs, whichever is greater) and satisfied all data follow-up items, transfer the final total numbers into the Survey Tracking Form. On the form, be sure to include:

- Total number of CSRs (based on early identification)
- Total number of online CSRs surveys completed
- Total number of undeliverables
- Total number of completed surveys for each secondary method, if used.

Email a copy of the completed Survey Tracking Form to Amy Wink at awink@nysilc.org.

The data follow-up steps for your center should be completed before or **by the end of May 2021**.

Centers will notify NYSILC by e-mail at awink@nysilc.org when they have entered the totals into the Survey Tracking Form. (The e-mail should contain the Survey Tracking Form as an attachment).

By early June 2021, NYSILC will verify the results for completeness and send a notice to centers and ACCES VR to acknowledge that survey sample obligations have been met, along with their center's Excel spreadsheet.

If a center has any issues with their survey results, please email ACCES VR at Joseph.Tedesco@nysed.gov.

NYSILC will develop and share a report based on the final collective findings by September 2021.

If you have questions about this methodology or the survey process, please contact Amy Wink at NYSILC at awink@nysilc.org.