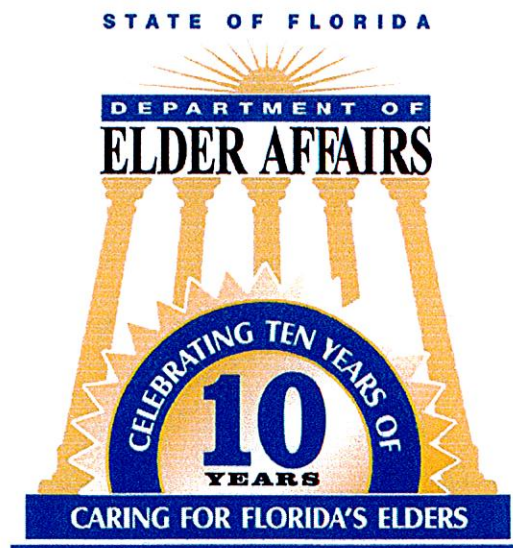


**2001 - ELDER HELPLINE
USER SATISFACTION
SURVEY**



**Terry F. White, Secretary
Jeb Bush, Governor**

*Prepared By:
DOEA Program Evaluation Group*



- Women are 35% More Likely to Call Than Men
- Elders With Post-High-School-Education Are Two Times More Likely to Call
- The Average Age of All Callers was 67, Elders Over 80 Years of Age Are Two Times More Likely to Call
- African Americans are 80% More Likely to Call Than Other Ethnic Groups
- Hispanics Are 20% More Likely to Call Than Non-Hispanics
- Rural Elders Are 44% More Likely to Call Than Their Urban-Dwelling Counterparts
- Elders Living Alone Are 61% More Likely to Call The Elder Helpline

Table of Contents

	Page
I. Executive Summary	1
Study Objectives	1
Major Findings	1
Methodology	2
II. Introduction	3
Background/Overview	3
III. Issues and Evaluative Criteria	4
I&R/A Agencies Performance—Targeting, Consumer Satisfaction	5
IV. Survey Instrument and Methodology	7
AoA Performance Outcome Measures Project (POMP)	7
Statistical Validity and Reliability	8
Consumer Satisfaction Model	10
V. Major Findings	11
Customer Profile Targeting	11
Services Efficiency and Reliability	12
Professionalism of Information Specialist	14
Value of the Information and Referral	15
Overall Customer Satisfaction	17
Customer Suggestions	18
Urban/Versus Rural Service Comparison	19
AAA - Inter-Agency Comparisons	20
Comparative Analysis - 2001/1999 Survey Results	21
VI. Conclusions and Recommendations	22
VII. Appendices	

List of Figures, Charts, and Exhibits

Figure Ref.#		Page
1.1	Helpline Consumer Satisfaction Survey --I&A Quality Measures	8
2.1	Effectiveness of Elder Helpline by Targeted Groups	11
3.1	Service Efficiency and Reliability - Average Quality Scores	13
4.1	Information Specialist Evaluation - Average Quality Scores	14
5.1	Value of I&R Help Provided - Average Quality Scores	15
6.1	Overall Experiences and Satisfaction - Average Quality Scores	17
7.1	Average Quality Scoring by Planning Service Area (PSA)	18
<hr/>		
Chart Ref.#		
1.1	Helpline Consumer Satisfaction Model	10
2.1	Callers Experience in Getting Through To A Live Attendant	12
3.1	Relative Frequency of Consumers Suggestions for Service Improvements	18
4.1	Urban Vs Rural I& A Provider - Average Quality Scores	19
5.1	Comparative Analysis- 2001/1999 Survey Results	21
<hr/>		
Exhibit Ref.#		Appendix
E1.1	Map of Elder Helpline Planning and Service Areas	A
E2.1	Survey Instrument - Information and Assistance Satisfaction Survey	B
E3.1	Tabulations of the Survey Results	

Executive Summary

Study Objectives

The purpose of this study was to measure the level of consumer satisfaction with the services of the *Elder Helpline*, the Information and Referral/Assistance (I&R/A) service of the Florida Department of Elder Affairs (DOEA). In addition to examining overall consumer satisfaction, this survey:

- ❑ Measured key service indicators of the quality of I&R/A services rendered based upon the following service parameters:
 - ✓ Telephone service efficiency and reliability
 - ✓ Professionalism of the information Specialist
 - ✓ Actionable value of the referral help
- ❑ Measured satisfaction levels in relation to service characteristics.
- ❑ Analyzed the demographics of the users of the service.
- ❑ Compared the performance of rural versus urban I&R/A units.

The results of this survey will be used to benchmark performance measures for I&R/A services throughout the state.

Major Findings

The study results clearly indicate a high level of consumer satisfaction with the services provided by The *Elder Helpline*. Consumers rated highest the professionalism of the Information Specialist (*the Messenger*), followed by the telephone service efficiency and reliability. The lowest scores were given to the value of the information provided (*the Message*). The survey also investigated whether there were significant service performance differences between urban and rural areas; the only difference noted was in the professionalism of the Information Specialist, with rural areas getting higher quality ratings. A comparison of performance by Planning and Service Area (PSA) found significant differences, with PSA 3 rating higher than other PSAs (See **Exhibit E1.1** depicting 11 PSAs).

An analysis of the demographic characteristics of callers to the Elder Helpline suggests that the program is serving its intended target customer base. *The propensity to use the service is higher for females, minorities, the oldest elders, rural elders, persons living alone, and elders with incomes below the poverty line.*

The results of this survey are comparable to the results of an earlier one, commissioned by DOEA in 1999. The prior survey found an overall satisfaction level of 85%, while the results of this survey found an overall satisfaction level of 90%. It is interesting to note that the average scores for 2001 are higher than 1999 with regard to the three measured service indicators.

Methodology

This Survey was conducted by DOEAs, Program Evaluation Unit staff through telephone interviews. Using tightly constructed questions, the Interviewers conducted the interviews from mid-morning to early evening during October 2 thru November 7, 2001. The survey group was drawn randomly from recent users of I&R/A services in six of the eleven PSAs. To ensure fresh recall from the consumers, contact was made with respondents during the first week of their initial inquiry for assistance.

Introduction

Background/Overview

The Florida Department of Elder Affairs, with funding provided by Title III of the Older American Act (OAA), sponsors a statewide telephone-based Information and Referral/Assistance service. The system, known as the **Elder Helpline**, provides toll-free calling access nationwide to any citizen by dialing 1-800-96-ELDER. The **Elder Helpline** is a starting point for someone seeking information about aging issues, looking for an aging services provider, or wanting to volunteer.

The **Elder Helpline** I&R/A service links all eleven (11) Area Agencies on Aging (AAA) in Florida by an electronic telephone network. There are currently 20 separate service locations to which inquirers may be electronically switched, depending on the geographically relevant telephone-prefix-area from which the call originates. These service locations are referred to as “I&R/A Agencies” throughout this report. **Exhibit E1.1** shows the location of the respective **Elder Helpline** I&R/A agencies.

The Florida Department of Elder Affairs and eleven area agencies share responsibility for the operation of the Elder Helpline. Although, DOEA contracts with the Area Agencies, the AAAs may operate the I&R/A system themselves or subcontract with other organizations to provide the service. For example, an AAA might contract with a United Way supported I&R/A service to act as the designated aging I&R/A service unit for a certain region. Similarly the Older American’s Act I&R/A unit may be located in the AAA offices, or it may be subcontracted to another non-profit with locally organized agencies in the aging network such as local Councils on Aging.

Finally, an aging-related department within a county government may also serve as a designated I&R/A service provider. Although the aging I&R/A service provider maintains a

contractual relationship with the Area Agency, they do not necessarily have a managerial relationship with the AAA.

Each year Area Agencies must submit a plan addressing the service needs of their respective areas, this plan includes Older American Act I&R/A activities and services. DOEA approves the plan or requires revisions as necessary, and administratively distributes the federal funds from the OAA annual authorization.

To ensure uniformity and a consistent standard of service, DOEA developed an I&R/A guidelines training manual. The training manual was designed to emphasize the best practices for the state's I&R/A services based on two national I&R/A organizations, the Alliance of Information & Referral Systems (AIRS) and the National Standards for Older Americans Act I&R/A Services (NASUA). Both of these organizations have played important roles in advancing effective practices in I&R/A customer service delivery.

Issues and Evaluative Criteria

I&R/A Agencies Performance – Targeting, Consumer Satisfaction.

There are several concerns about possible differences between the quality and level of services provided in rural versus urban areas. These concerns could possibly affect service delivery in various I&R/A Agencies in over half of the counties in Florida. The less densely populated rural areas with smaller tax bases and lower per capital income are poorly funded and have far fewer staff and resources than their better supported I&R/A cousins in urban areas. Smaller I&R/A units are facing the pressures of adding costly technology to achieve the high-tech infrastructure required for accreditation by professional I&R/A standards.

In accordance with provisions of the Older American Act, Area Agencies are required to develop their plans to reach disadvantaged and underserved constituencies. This survey also analyzed the demographic characteristics of the users of the service to measure whether disadvantaged constituencies are properly targeted.

Also, there is a national initiative to use the three-digit **211** prefix for universal telephone access to all types of community resource information. The **211** initiative was authorized and established by the Federal Communications Commission (FCC) in July of 2000. The implementation of **211** will enable inquirers to contact providers in the aging network 24 hours a day. Additionally, should this initiative be implemented, I&R/A providers will have to become compliant with recognized professional standards for information and referral/assistance. It is expected that smaller I&R/A agencies will have difficulties

in implementing the more stringent standards because of their limited resources.

The Florida Legislature mandated that DOEA and its providers be accountable for service performance and meet specific performance measure targets on services provided. In keeping with its legislative mandate, the Florida Department of Elder Affairs has adopted "the percent of elders who give and excellent rating on the Elder Helpline evaluation assessment" as a gauge of the effectiveness of the *Elder Helpline*.

Survey Instrument and Methodology

AoA Performance Outcomes

Measures Project (POMP)

The survey instrument utilized for this study was based upon an instrument developed by the participants of a national project sponsored by the Administration on Aging. The Administration on Aging (AoA) has initiated an effort to develop and field-test a core set of performance measures for state and community programs on aging operating under the Older Americans Act (OAA). Entitled the *Performance Outcomes Measures Project (POMP)*, this initiative helps State and Area Agencies on Aging address their own planning and reporting requirements, while assisting AoA to meet the accountability provisions of the *Government Performance and Results Act (GPRA)*.

Responses were added to some questions to provide Florida-specific responses, for example, the *option “HMO withdrawals”* was added to the option in the question “Please tell me the reason why you called?” Respondents were encouraged to be candid in their answers, and were given assurance that their participation would not jeopardize any services they currently receive.

The instrument was designed to measure overall I&R/A customer satisfaction and user assessment of I&R/A quality characteristics. These quality characteristics reflect consumer expectations and attitudes about I&R/A services. **Figure 1.1** shows the three service components, the items used to measure quality, and the items used in assessing overall customer satisfaction.

Figure 1.1

HELPLINE CONSUMER SATISFACTION SURVEY I&A QUALITY MEASURES

SERVICE CHARACTERISTIC	SCALE-MEASUREMENT VARIABLES
1. Communication services' efficiency and reliability	Call answered by voice mail or person, busy signal, time to get through, quickness of answered call, understanding voice mail instructions, leaving a message.
2. Professionalism of the information specialist	Listening to consumer call, understanding what the consumer needs, and Information and referral explanation.
3. Value of the information and referral help provided	Receiving the need information, consumer contact referred places, services from referred places other, and number of calls made before getting through, and expectation about the usefulness of the information received in resolving the issue that prompted the consumer's call.
4. Overall consumer satisfaction	Satisfaction with the way call was handled, and recommendation of referring the service to a friend or colleague.

Statistical Validity and Reliability

The survey was conducted from October 2, 2001 through November 7, 2001. To facilitate the availability of respondents, telephone calls were placed from mid-morning through early evening. The names and telephone numbers of consumers who called the I&R/A service were given by the I&R/A providers to the Program Evaluation Unit. To ensure fresh recall from the consumers, the interviewers called them within a week of the initial call for assistance to the I&A provider.

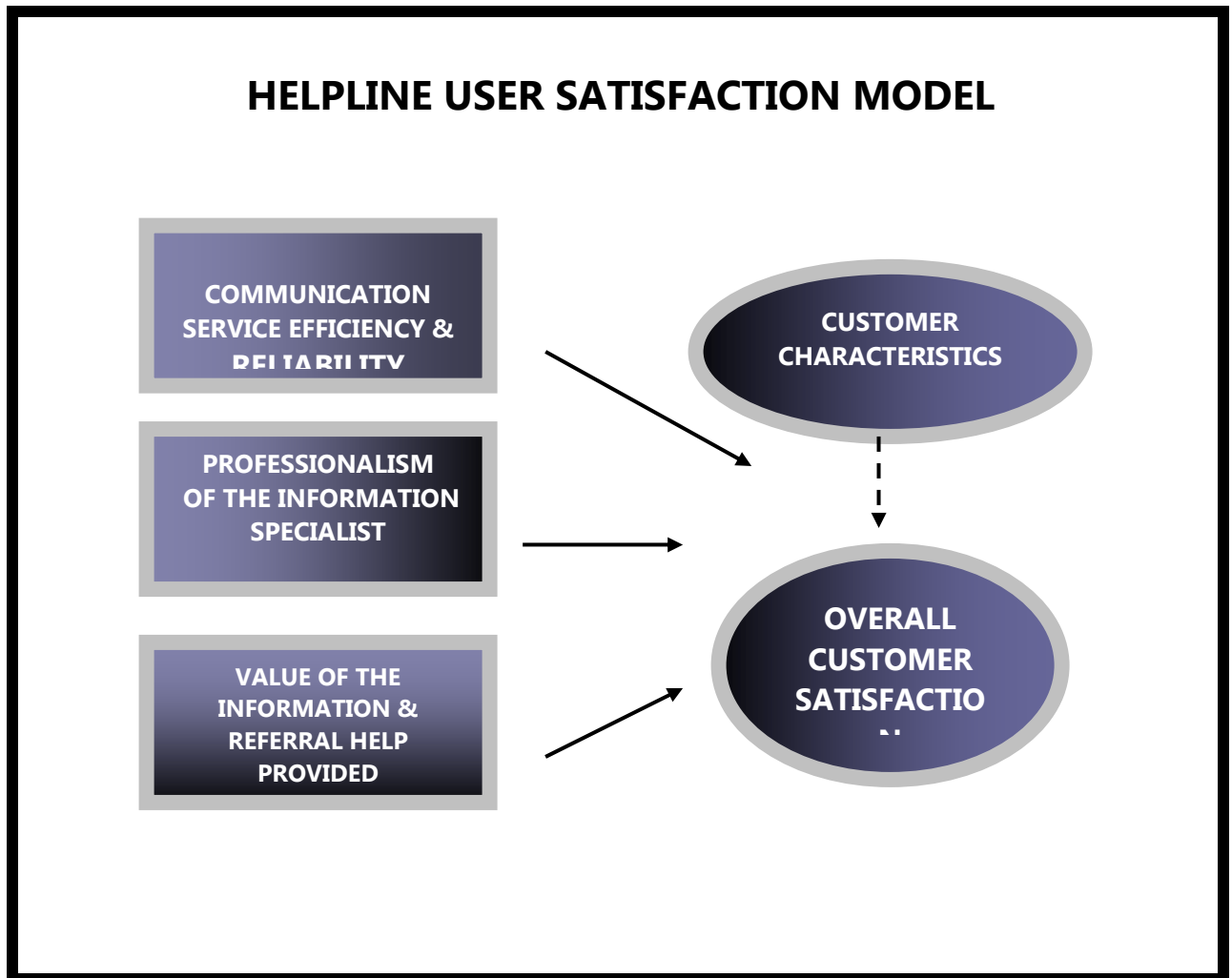
A total of 537 interviews were completed covering six Planning and Service Areas (PSAs) 1, 3, 4, 6, 8, and 11. PSA 3 and PSA 4 were included because they are partnering with DOEA in the AoA sponsored "POMP" initiative previously discussed. PSA 1 and PSA 6 were included because of their recent consolidation of I&A services at the Area Agency level, while PSAs 8 and 11 were included since their I&R/A services are provided via lead agencies.¹ The sample size reflects a 95% confidence level with

a margin of error of plus or minus 3.5%. The survey instrument is included in Exhibit E2.1 and may be assessed via the Internet at - (<http://www.gpra.net/pompII/A-IISurvey.pdf>).

To establish the validity and reliability, i.e. “consistency” of the survey instrument a statistical analysis was performed. The statistical results show as a measure of reliability and validity. This measure varies from 0 to 1, with 1 indicating a perfectly reliable and valid instrument. The Chronbach’s Alpha was .92.²

To test satisfaction differences in caller satisfaction, average scores were compared using the Kruskal-Wallis test which is a non-parametric statistical test of the significance of differences among two or more averages. This type of test is more robust in delineating deviations from standard statistical assumptions about the distribution of the underlying data and their measurement level.

Chart 1.1



Consumer Satisfaction Model

The I&R/A customer satisfaction model for this study is shown above in Chart 1.1. This evaluation assumes that the quality of the service components determines consumer satisfaction, and that the level of satisfaction is mediated by consumer characteristics. That is, the relatively importance of a particular component of the service may depend on the user. For example, older customers may be more displeased with an automated response system than younger consumers.

Major Findings

Customer Profile - Targeting

Overall, The Elder Helpline appears to be doing a good job at targeting disadvantaged populations. The caller records show that minorities, elders with lower incomes, and the oldest elders have higher than average service usage rates. Customers called to obtain information for themselves (62%). Only 8% of the consumers said that they used this service before. Figure 2.1 shows the main characteristics of the customers that called during the sampling period and their reference population.

Figure 2.1

EFFECTIVENESS OF ELDER HELPLINE BY TARGETED GROUPS (Percentage of Respondents)

CATEGORY	SAMPLE (n= 537)	REFERENCE POPULATION*	ODDS RATIO**	PROPENSITY TO CALL HELPLINE
Gender (Percentage)				
Females	77%	57%	1.35	+35%
Education (Percentage)				
Less Than High School	10%	24%	0.42	- 58%
Age (Percentage)				
Average Age	67 Yrs	79 Yrs		
75 Years +	28%	38%	0.74	- 26%
80 Years +	13%	5%	2.60	+160%
Ethnicity/Race (Percentage)				
Non-Hispanic White	79%	87%	0.91	-9%
Hispanic	6%	5%	1.20	+20%
African American	15%	8%	1.88	+88%
Lifestyle (Percentage)				
Rural	36%	25%	1.44	+44%
Live alone	37%	23%	1.61	+61%
Income (Percentage)				
Average Income	\$17,000	\$22,676		
Income Below \$11,250	16%	12%	1.33	+33%

* Average of the six PSAs in the survey, weighted by the PSA's share of callers in sample.

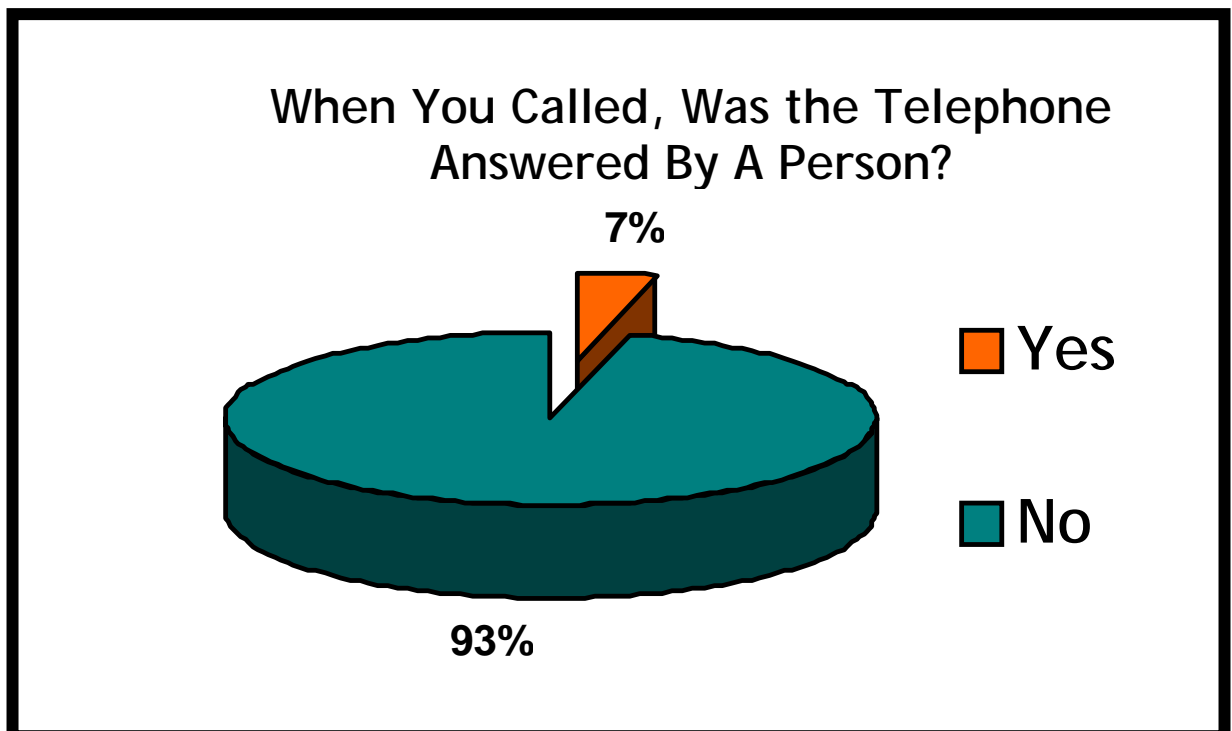
** See End note number 3 for further explanation of Odds Ratio.

Services Efficiency/Reliability

The survey results indicate that Elder Helpline providers are efficient and reliable in answering calls without undue delays. The vast majority of the calls are handled by a live operator. For example, as depicted in **Chart 2.1** ninety-three percent (93%) of the consumers said their calls were answered by a person.⁴ A common complaint among users of I&A services is their displeasure with automated voice response systems. Most people prefer talking directly to another individual rather than an automated telephone attendant.

Elders are especially sensitive to this issue since:

- Memory and cognitive processing times among elders are more variable than among young persons (*automated response systems do not adjust for this variability*)
- Automated systems cannot adjust volume or speech cadence to compensate for hearing impairments, (*which are more common among elders*).
- Elders value human interaction more than younger persons.



When consumers were asked, “Did you get a busy signal?” 96% of the respondents said “no”. This is another indication of the quality of the I&R/A services.⁵ On the other hand only 81% of the respondents whose calls were answered by voice mail indicated that the voice mail instructions worked very well.⁶ Only 11% of the consumers had to leave a message when they call the I&R/A services. Also 73% of the consumers who left a message indicated that someone called them back. Sixty-three percent (63%) of the consumers who left a message were called back the same day. With one third of them being called within one hour.⁷ **Figure 3.1** below summarizes the quality scores for service efficiency and reliability.

It should be noted that service could be improved for the 27% of callers who left a message and did not get help. As a matter of policy and standard operating procedures, the Information Specialist should return all calls within one business day of receiving the message.

Figure 3.1

SERVICE EFFICIENCY AND RELIABILITY AVERAGE QUALITY SCORES (Percentage of Respondents)	
SURVEY QUESTIONS	AVERAGE SCORES
When you called the Elder Helpline last week, did you get a non-busy signal?	96%
Was your call answered quickly?	92%
Was the phone answered by a person?	93%
Did you understand the voice mail instructions? (for those that apply)	81%
I did not have to leave a message	89%
Overall average quality score for efficiency and reliability	90%

Professionalism of Information Specialist

In a telephone-based I&R/A system, the critical interface component between the system and the customer is the person who processes the call. An I&R/A system may have the best referral database and the most appropriate technology, but consumers will not be satisfied if they cannot understand the information provided, or if the I&R/A Specialist turns them off. Customer *“turn off”* can result from improper use of language or lack of courtesy. **Figure 4.1** shows that overall most callers were “very satisfied” with the Information Specialist’s performance with respect to understanding, listening, explaining, and information delivery.

When callers were asked, “Overall, did you feel that the person(s) who talked with you listened carefully to what you wanted?” the majority (97%) said “Yes, definitely” or “Yes, I think so.” Ninety Seven percent of the consumers said “Yes, definitely” or “Yes, I think so” when answering whether the person(s) who talked with them understood what they wanted. Furthermore, 97% of the consumers said “Yes, definitely” or “Yes, I think so” when asked whether they understood the explanation of I&R/A Specialist

Figure 4.1

INFORMATION SPECIALIST EVALUATION AVERAGE QUALITY SCORES (Percentage of Respondents)

SURVEY QUESTIONS	AVERAGE SCORES
Overall, did you feel that the person(s) who talked with you listened carefully to what you wanted?	97%
Overall, did you feel that the person(s) who talked with you understood what you wanted?	97%
Did he/she explain things to you in a way that you could understand?	96%
Overall average quality score for information specialists	97%

Value of the Information Referral

Overall 87% of the callers declared that they had received the information requested and 90% of them indicated that such information would be of use (see Figure 5.1) The ultimate goal of an I&R/A system is to provide consumers with actionable information that saves them time and money. This means that I&R/A Specialist should not only provide direct contact numbers to agencies or programs, but they should also provide the caller with information about what to expect when they call the agencies. I&R/A services should educate the consumer on such matters as potential waiting lists, difficulty of reaching the agency (e.g. busy signals, hours of operation), and specific questions to ask when they get someone on the line.

Figure 5.1

VALUE OF I&R HELP PROVIDED
AVERAGE QUALITY SCORES
(Percentage of Respondents)

SURVEY QUESTIONS	AVERAGE SCORES
Overall, did you receive the information from the Elder Helpline that you were looking for?	87%
Did you contact them?	79%
Did you start receiving services from any of the places you were referred?	50%
Percent of callers that made 1 or 2 calls to get information needed (avg)?	80%
Do you expect that the information you received from the Elder Helpline will be helpful in resolving the issue you call for?	90%
Overall average quality score for referral help and utilization	77%

In addition to clarifying the caller's problem and directing them where to go for help, the information and assistance services should include taking additional actions on behalf of the caller. For example, sending the caller information on how to find quality nursing homes, crisis counseling, advocacy with an agency to which he/she is being referred.

Forty-seven percent of the consumers were given names of other places to call.⁸ Among these consumers, 79% of them made the referral calls. Of those consumers who did not contact the referral sources; 67% of them indicated that they "Have not had a chance to yet." Only 51% of consumers had received services from the places to which they were referred. On the average, it took 1-2 calls for the consumers to get the information they needed.

Overall Consumer Satisfaction

Two global measures of consumer satisfaction: willingness to recommend service to a friend and overall satisfaction with the way the call was handled, (see Figure 6.1) were found to correlate significantly with two of the characteristics of the service: Efficiency and reliability and professionalism of the Information Service Specialist.

Although the value of the information provided had a positive correlation with these global measures, the correlation was not as high. This further evidence that pleasant and efficient service is necessary for consumer satisfaction.

Figure 6.1

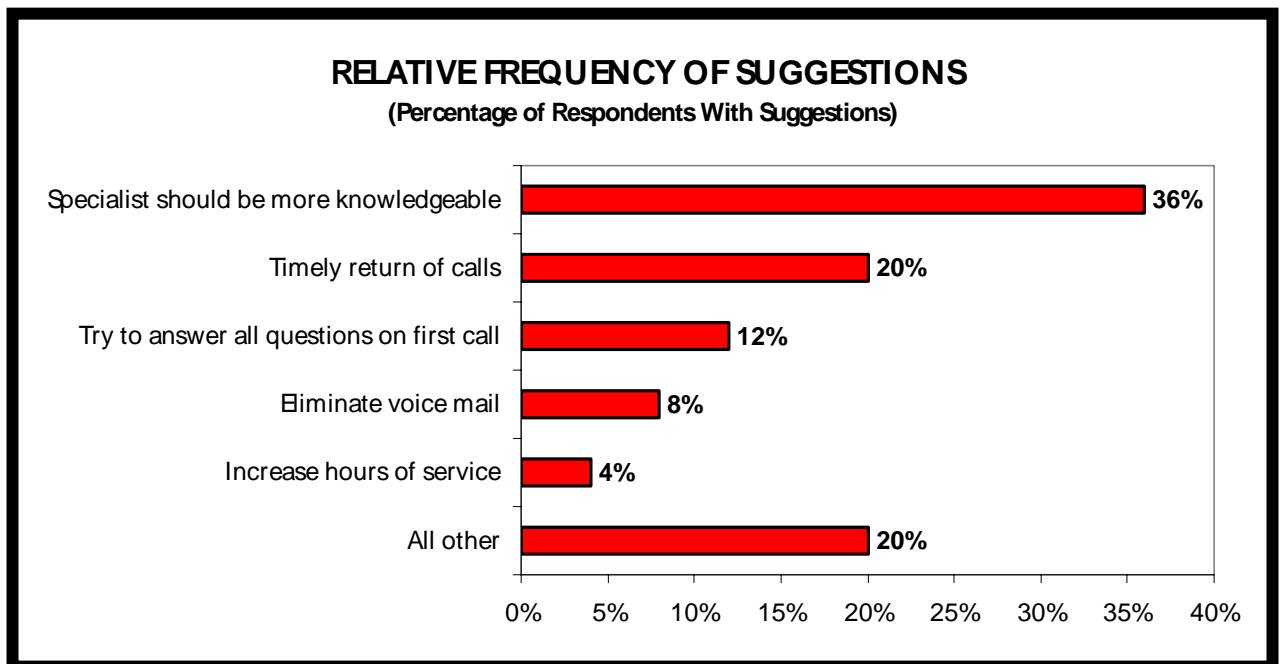
OVERALL EXPERIENCES AND SATISFACTION	
AVERAGE ITEMS SCORES	
(Percentage of Respondents)	
SURVEY QUESTIONS	AVERAGE SCORES
Overall, how satisfied were you with the way your call was handled?	90%
Would you recommend this service to a friend or colleague who needs the kind of information and assistance you did?	92%
Average score for overall experiences and satisfaction	91%

Customer Suggestions

Customers were asked to provide suggestions for service improvement. Seventy-Five percent of the consumers did not have any recommendations to improve the Elder Helpline. Of the remaining 25 percent, consumers' recommendations ranked as follows (see Chart 3.1 for relative frequency of suggestions):

- Persons answering phone should be more knowledgeable
- I&R/A resource person should be more timely in returning telephone calls
- An attempt should be made to answer all questions on the first call
- Eliminate voice mail system, and have person(s) answer the phone
- Expand service availability hours

Chart 3.1

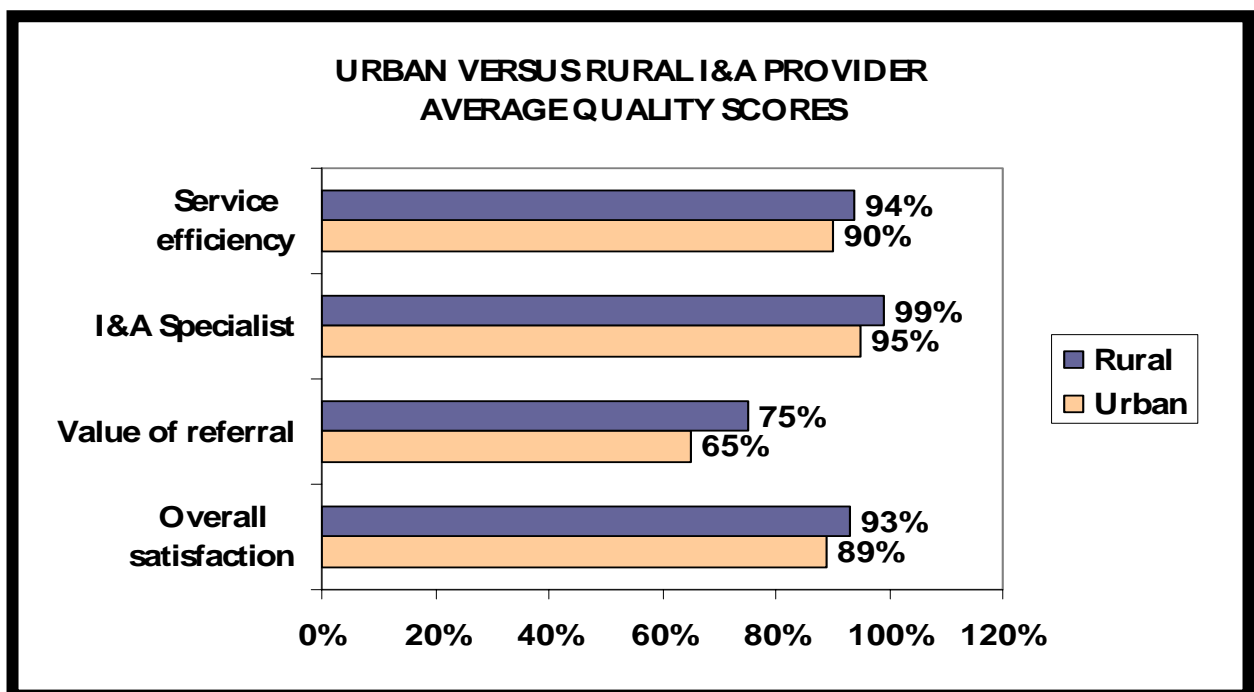


Urban /Rural Service Comparison

An objective of this assessment of the Elder Helpline is to measure whether user satisfaction for rural I&R/A providers is on par with their urban counterparts. To this end, callers were asked during the survey period to provide their geographic residence status (rural, suburban, or urban.) Aggregate quality indices were then computed by geographical location.

A caveat is in order: The data for geographical location was not as complete as with other demographic items. Therefore, many observations could not be included in the urban/rural comparison and, as a consequence, the quality scores do not add-up to the overall quality scores analyzed in the previous sections. However, to the extent that we could not detect a geographic bias in the missing data, the comparative results should be reliable. Chart 4.1 indicates that rural I&R/A providers did better than their urban counterparts in every aspect of service and in overall call satisfaction. Figures C1 through C5 in Table 2 of Appendix C have the detailed breakdown by item that made up the quality scores reported in Chart 4.1.

Chart 4.1



AAA Intra-Agencies Comparisons

Another geographical level comparison was made among average aspects of quality indices across the six PSAs. Another caveat: sample sizes in the data cells at the AAA level of PSA 1 and PSA 11 were small. Therefore the statistical power of the comparisons among AAAs that are close in quality ratings is very low. However, some inference can still be made for AAAs that have larger sample sizes or large quality score spreads. Figure 7.1 below suggest that PSA 3 has overall quality scores that are higher than the other PSAs, with PSA 4 having the lowest scores.

Figure 7.1

HELPLINE COMPARISON OF PSAs SURVEYED AVERAGE QUALITY SCORES BY PSA (Percentage of Respondents)

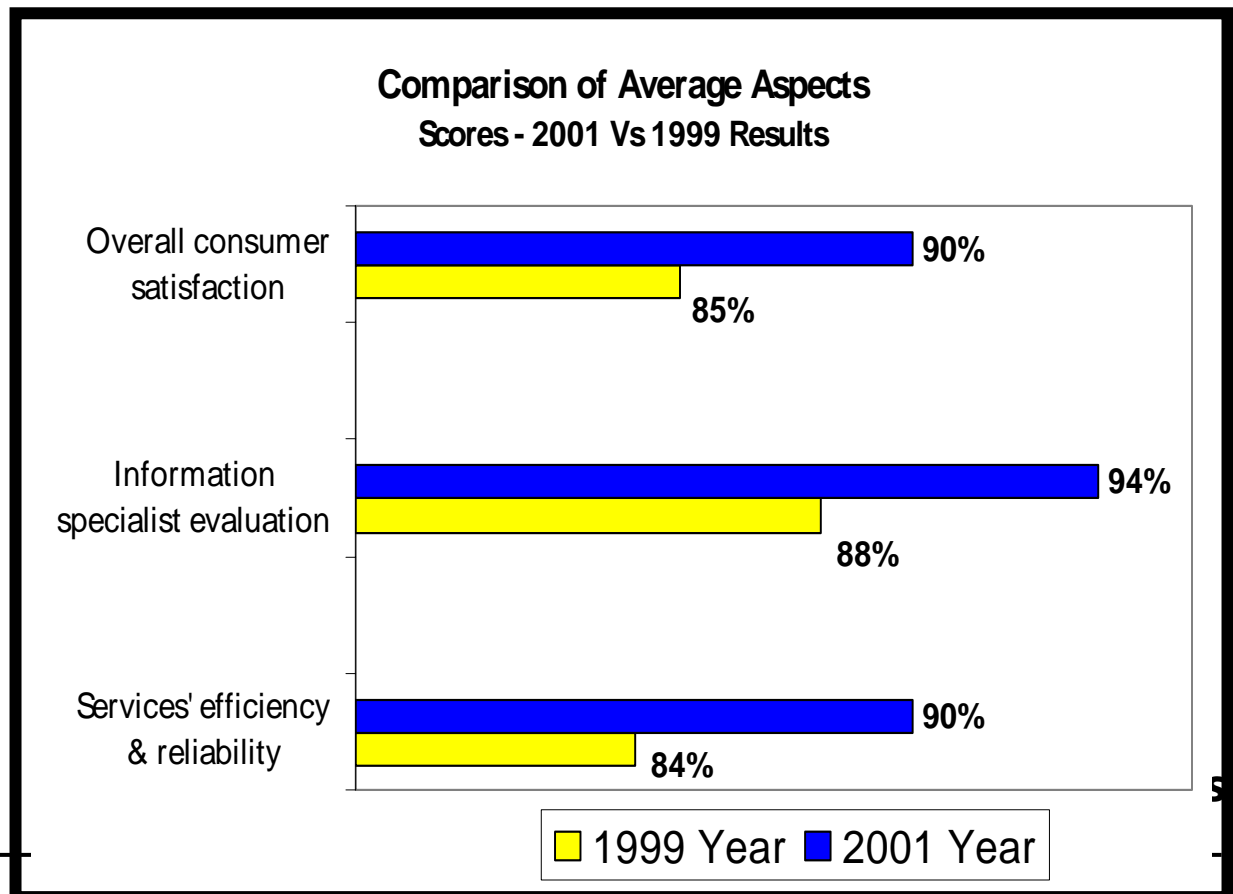
- - - - - QUALITY ASPECT AVG SCORE - - - - -				
PLANNING SERVICE AREA	SERVICES EFFICIENCY & RELIABILITY	INFORMATION SPECIALIST EVALUATION	REFERRAL HELP UTILIZATION	OVERALL EXPERIENCE & SATISFACTION
PSA - 1	98%	100%	88%	100%
PSA - 3	88%	99%	82%	96%
PSA - 4	91%	95%	79%	86%
PSA - 6	92%	98%	76%	90%
PSA - 8	92%	97%	79%	92%
PSA - 11	76%	90%	56%	84%
Overall Avg.	90%	97%	77%	91%

Analysis – 2001/1999

Comparative Survey Results

The results of this survey are similar to the results of another Elder Helpline survey done in 1999. Although the 1999 survey did not use the same instrument, it covered similar aspects (efficiency and reliability of the services, information specialist evaluation) and it provided a similar overall measure on consumer satisfaction. **Chart 5.1** shows these aspects with their average scores for the 2001 and for the 1999 survey. For the 1999 survey, the “overall consumer satisfaction” with the I&R/A services was rated 85% as excellent or good by the consumers, while in the recent survey the “overall consumer satisfaction” was 90%. The 2001 survey results reflect a 5% improvement in overall consumer satisfaction over the 1999 survey results.

Chart 5.1



This study reports the results of a survey to measure consumer satisfaction with Information and Referral/Assistance (I&R/A) services provided by the Florida Department of Elder Affairs (DOEA) in partnership with the state's eleven Area Agencies on Aging.

The primary objective of this survey was to determine the overall satisfaction level of Users of the Elder Helpline. The survey also addressed and answered the following baseline questions:

1. Who uses the Elder Helpline?
2. Are disadvantaged/underserved constituencies being served?
3. How efficient and reliable is the service?
4. What qualitative variables do consumers value most when seeking I&R/A services?
5. Are there discernable differences between the service level of rural versus urban I&R/A agencies?
6. How do consumers rate the value of the I&R/A help provided?

This survey found that I&A/R units are doing a good job reaching the intended customers: Females, minorities, the oldest elders, persons living alone, rural elders, and elders with low incomes.

While the results of the Survey indicated that *consumers rated the Helpline's overall quality and service level high (90% overall level of consumer satisfaction)*, also suggest that the value of the information provided could be higher. For example, while consumers found the I&R/A service to be reliable and the Information Specialist very professional, they did not rate the end product – *“the value of the information and referral provided”* – equally as high.

Other significant findings that emerged from the study are that elders generally have a higher level of disregard for the use of voice mail and automated attendant systems, and that

Information Specialists located in rural (generally smaller) I&R/A agencies received higher consumer satisfaction ratings than their better funded urban counterparts.

The data also suggests that the largest influence on the overall level of consumer satisfaction is the demeanor and degree of professionalism displayed by the Information Specialists. Information Specialists that the callers considered to be impatient, or poorly prepared, non-responsive, or indifferent to their inquiry turned off elders. Other suggestions included the need for the Information Specialist to answer as much information as possible during the first call.

Specific recommendations resulting from this study underscore a need for some I&A/R providers to do better on content delivery. Consumers need an end product that has greater value. It is not enough to just make a referral or provide customer-hand-off to another agency, but content (the message) must have value to the end user.

The results of this survey can be compared to those of a similar survey done in 1999. In this regard, there appears to be a significant improvement in the overall customer satisfaction level for this survey (2001) over the previous period's survey (1999).

While it was not within the scope of this study to perform an assessment of the technical aspects of the I&A/R system, some inference can be made from customers' feedback and comments. The value and actionability of the information and referral provided to callers of the *elder helpline* can be affected by the completeness and integrity of the I&A unit's customer service and referral database, its indexing capability, the overall familiarity that the Information Specialist has with the type and nature of the inquiries that frequently come through, and the degree of sophistication and automation of the I&A system being deployed

NOTES

¹Lead agencies are county level case management agencies. DOEA contracts with lead agencies to coordinate the different programs at the consumer level.

²Alken, Lewis R. Psychological Testing and Assessment. Pearson Higher Education, 1999.

³For example, as illustrated in figure 2.1, 87% in the general population of elders were non Hispanic White but they placed only 79% of the calls (and Odds Ratio of $79\% \div 87\% = .91$) On the other hand, African American elders represented 8% of the population but placed 15% of the calls (an Odds Ratio of $15\% \div 8\% = 1.88$.)

⁴ See Appendix C Table 1, Q.6.

⁵ Ibid, see Q.4

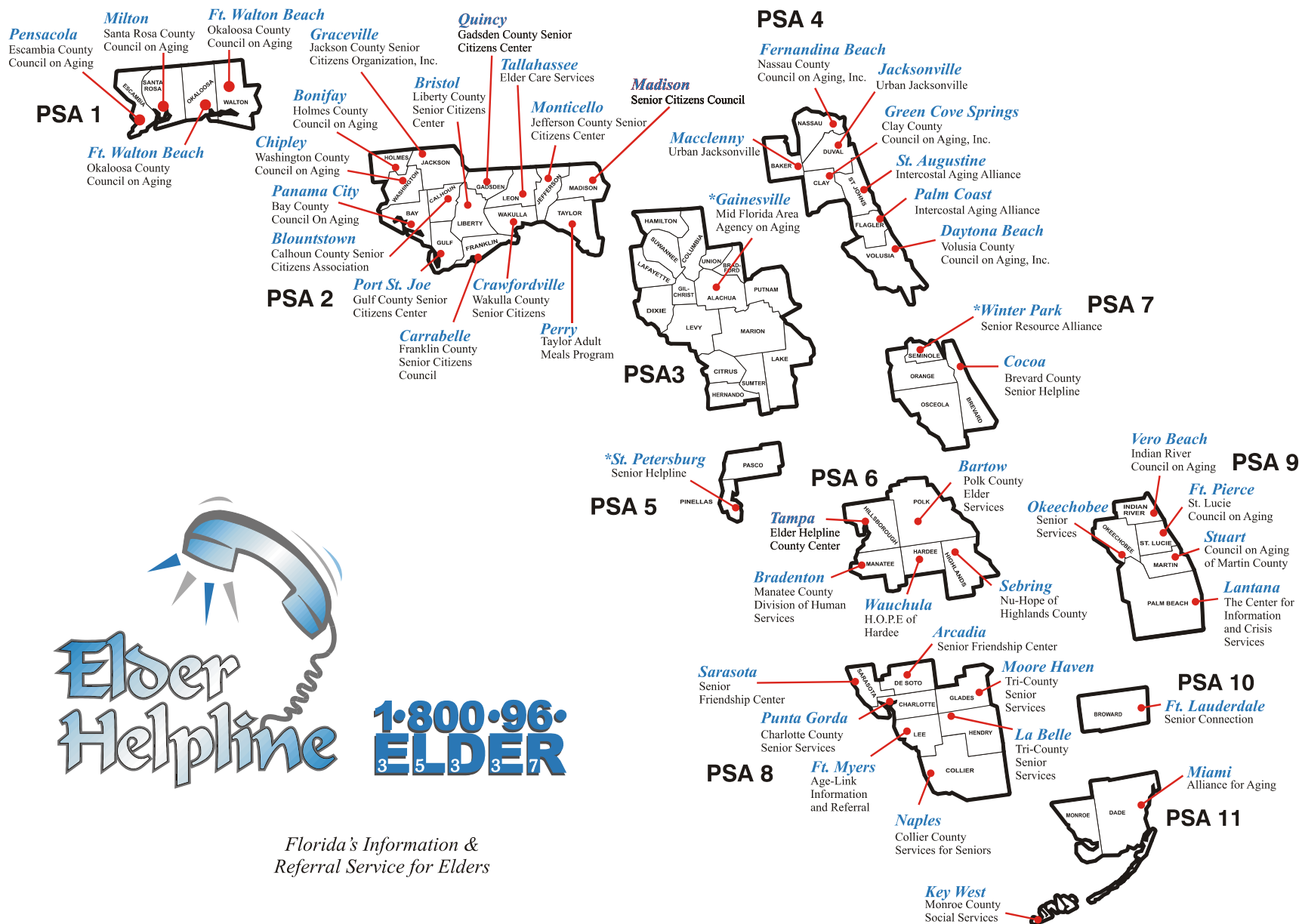
⁶ Ibid, see Q.6a

⁷ Ibid, see Q.7b

⁸ Ibid, see Q. 11

VII. APPENDICES

APPENDIX A



1-800-96-ELDER
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Florida's Information & Referral Service for Elders

APPENDIX B

INFORMATION AND ASSISTANCE SATISFACTION SURVEY
Version: September 28, 2001

Hello [CLIENT'S NAME]. My name is [INTERVIEWER'S NAME] of the [AGENCY'S NAME]. I am following up with people who have called [AGENCY'S NAME] in the past few weeks, to ask for their feedback about the Information and Assistance Services. This will just take a few minutes and will help improve our service to callers. Your responses are completely anonymous and will not affect the services that you are receiving in any way.

So, let's talk about your call last week [DATE]_____ to the Information and Assistance Services of [AGENCY'S NAME] about _____[TOPIC OF CALL]

Please answer each question by checking the appropriate response or filling in the blank.

PLEASE READ ALL CHOICES UNLESS DIRECTED OTHERWISE.

1. First, did you call [NAME OF I & A SERVICE] to obtain help or services for yourself, to get help for a relative or someone you know, or were you calling from an agency for a client?

- ..
- For self (Service recipient)
 - " For relative/friend (Caregiver)
 - " For client (Formal provider)
 - " Other(describe): _____

2. Please tell me the reason why you called.

- " To get information
- " To obtain services (transportation, housing, health care, meals, etc.)
- " To refer a client for services
- " To follow up on a prior call
- " Other (describe): _____

3. Had you ever used this service before last week?

- " Yes
- " No (***Skip to 4***)

3a. About how many times have you used it in the past year? _____

4. When you called the [NAME OF I & A SERVICE] last week, did you get a busy signal?

- " Yes
- " No (***Skip to 5***)

4a. How many times did you call before getting through? _____

Office Use Only: 1 of 6

Client ID: _____ Survey Date: _____

Date of Original I&A Call: _____ I&A Operator ID: _____

INFORMATION AND ASSISTANCE SATISFACTION SURVEY
Version: September 28, 2001

5. How quickly was your call answered?

- " Immediately, such as after 1 ring or two rings
- " Quickly, less than 5 rings
- " After a little while, 5-15 rings or
- " Had to wait a long time, more than 15 rings

6. Was the phone answered by voice mail or by a person?

- " Person (**Skip to 7**)
- " Voice mail

6a. How well did you understand the voice mail instructions?

- " Very well
- " Somewhat well
- " Only a little
- " Not at all

7. Did you have to leave a message?

- " Yes
- " No (**Skip to 8**)

7a. Did someone call you back?

- " Yes
- " No (**Skip to 7c**)

7b. When did they call you back?

- " Within the hour
 - " In the same day
 - " In the same week
 - " More than a week
- (Skip to 8)**

7c. Did you call them back?

- " Yes
- " No (**Skip to 14**)

7d. Did you speak with a person when you called them back?

- " Yes
- " No (**Skip to 14**)

INFORMATION AND ASSISTANCE SATISFACTION SURVEY
Version: September 28, 2001

Now I have a few questions about the person you spoke to at the [NAME OF I & A SERVICE].

8. Overall, did you feel that the person(s) who talked with you listened carefully to what you wanted?

- ☐ Yes, definitely
- ☐ Yes, I think so
- ☐ No, I don't think so
- ☐ No, definitely not

8a. Overall, did you feel that the person(s) who talked with you understood what you wanted?

- ☐ Yes, definitely
- ☐ Yes, I think so
- ☐ No, I don't think so
- ☐ No, definitely not

9. Did she/he explain things to you in a way that you could understand?

- ☐ Yes, definitely (*Skip to 10*)
- ☐ Yes, I think so (*Skip to 10*)
- ☐ No, I don't think so
- ☐ No, definitely not

9a. What kind of problems did you have?

- ☐ Language problem
- ☐ Hearing problem
- ☐ Don't remember
- ☐ Other, specify _____

10. Overall, did you receive the information from [NAME OF I & A SERVICE] that you were looking for?

- ☐ Yes, definitely
- ☐ Yes, I think so
- ☐ No, I don't think so
- ☐ No, definitely

11. Were you given names of any other places to call?

- ☐ Yes
- ☐ No (*Skip to 12*)
- ☐ N/A (*Skip to 12*)

INFORMATION AND ASSISTANCE SATISFACTION SURVEY
Version: September 28, 2001

11a. Did you contact them?

- ☐ Yes (*Skip to 11c*)
- ☐ No

11b. Why not? (***DO NOT READ LIST***)

- ☐ Haven't had a chance to yet
- ☐ I tried to, but haven't heard from them yet
- ☐ They called and left message, but I haven't called them back.
- ☐ I got help from somewhere else
- ☐ Other (describe): _____

(*Skip to 12*)

11c. Did you start receiving services from any of the places you were referred to?

- ☐ Yes
- ☐ No

12. Have you made any other calls on your own to get the information or help you needed?

- ☐ Yes
- ☐ No (*Skip to 13*)

12a. Did you get the information or help you needed?

- ☐ Yes
- ☐ No (*Skip to 14*)

12b. About how many calls did you have to make before you got the information or help you needed? _____

I have a few questions about your overall experience with the [NAME OF I & A SERVICE].

13. Do you expect that the information you received from [NAME OF I & A SERVICE] will be helpful in resolving the issue you called about?

- ☐ Yes, definitely
- ☐ Yes, I think so
- ☐ No, I don't think so
- ☐ No, definitely not

INFORMATION AND ASSISTANCE SATISFACTION SURVEY
Version: September 28, 2001

14. Overall, how satisfied were you with the way your call was handled?

- ☐ Very satisfied
- ☐ Satisfied
- ☐ Somewhat satisfied
- ☐ Not at all satisfied

15. Would you recommend this service to a friend or colleague who needs the kind of information and assistance you did?

- ☐ Yes, definitely
- ☐ Yes, I think so
- ☐ No, I don't think so
- ☐ No, definitely not

16. Do you have any recommendations on how to make the [NAME OF I & A SERVICE] better?
(DO NOT READ LIST. Check all that apply)

- ☐ None
- ☐ Increase the hours the service is available
- ☐ Reduce the waiting time to speak to someone
- ☐ Eliminate voice mail system/have persons answer the phone
- ☐ The persons who answer the phone should be more knowledgeable
- ☐ Try to answer all questions on the first call
- ☐ Be more timely in returning phone calls
- ☐ Other (describe): _____

Finally, could you please tell me a bit about yourself? Like all of your other answers, all of this information will be kept strictly confidential.

I & A, Part 2, Demographics

1. Where is your home located? Would you say . . .

- ~ A) In a city
- ~ B) In the suburbs of a city
- ~ C) In a small town or rural area.

2. What is your home zip code? _____

3. What is your date of birth? ____/____/____ (month / day / year)

4. **[Interviewer: Record sex of respondent. If not obvious, ask:]** What is your gender?

- ~ A) Male
- ~ B) Female

INFORMATION AND ASSISTANCE SATISFACTION SURVEY
Version: September 28, 2001

5. Which of the following statements describes your living arrangements? **[Check all that apply.]**

- ~ A) I live alone.
- ~ B) I live with my spouse.
- ~ C) I live with my children.
- ~ D) I live with other persons.

6. What is your highest educational level?

- ~ A) Less than High School Diploma
- ~ B) High School Diploma
- ~ C) Some college, including Associate degree
- ~ D) Bachelor's Degree
- ~ E) Some post-graduate work or advanced degree or degrees

7. What is your race? **[Check all that apply.]**

- ~ A) White or Caucasian
- ~ B) Black or African American
- ~ C) Asian
- ~ D) American Indian or Alaskan Native
- ~ E) Native Hawaiian or Other Pacific Islander
- ~ F) Other

8. Are you of Hispanic origin?

- ~ A) Yes
- ~ B) No

9. What was the total combined income for all persons in your household during the past 12 months, including income from jobs, Social Security, retirement income, public assistance, and all other sources?

- ~ A) Less than \$5,000
- ~ B) \$5,001 – \$8,350
- ~ C) \$ 8,351 – \$11,250
- ~ D) \$ 11,251 – \$14,150
- ~ E) \$ 14,151 – \$20,000
- ~ F) \$ 20,001 – \$35,000
- ~ G) \$35,001 – \$50,000
- ~ H) \$50,001 or more

That is all the questions I have. Do you have any other comments? **Thank you very much for your time and cooperation.**

APPENDIX C

Table 1
Survey results

1. First, did you call [NAME OF I & A SERVICE] to obtain help or services for yourself, to get help for a relative or someone you know, or were you calling from an agency for a client?

Type of call	Number	Total	Percent
For self (Service recipient)	330	537	62
For relative/friend (Cargiver)	211	537	39
For client (Formal provider)	16	537	3
Other	9	537	2

2. Please tell me the reason why you called.

Reason	Number	Total	Percent
To get information	375	537	70
To obtain services	206	537	39
To refer a client for services	5	537	1
To follow up on a prior call	1	537	0
For assistance with HMO withdrawals	1	537	0
Others	1	537	0

3. Had you ever used this service before last week?

Response	Number	Percent
Yes	46	8
No	482	92
Total	528	100

3a. About how many times have you used it in the past year?

Response	Number	Percent
Once	14	40
Twice	15	43
Three or more	6	17
Total	35	100

4. When you called the [NAME OF I & A SERVICE] last week, did you get a busy signal?

Response	Number	Percent
Yes	21	4
No	507	96
Total	528	100

4a. How many times did you call before getting through?

Response	Number	Percent
Once	2	12
Twice	11	65
Three	1	6
Four	3	17
Total	17	100

5. How quickly was your call answered?

Response	Number	Percent
Immediately, such as after 1 ring or 2 rings	36	7
Quickly, less than 5 rings	477	92
After a little while, 5-15 rings	3	1
Had to wait a long time, more than 15 rings	1	0
Total	517	100

6. Was the phone answered by voice mail or by a person?

Response	Number	Percent
Person	488	93
Voice mail	39	7
Total	527	100

6a. How well did you understand the voice mail instructions?

Response	Number	Percent
Very well	30	81
Somewhat well	4	11
Only a little	2	5
Not at all	1	3
Total	37	100

7. Did you have to leave a message?

Response	Number	Percent
Yes	58	11
No	464	89
Total	522	100

7a. Did someone call you back?

Response	Number	Percent
Yes	48	73
No	18	27
Total	66	100

7b. When did they call you back?

Response	Number	Percent
Within the hour	11	23
In the same day	19	40
In the same week	18	38
Total	48	100

7c. Did you call them back?

Response	Number	Percent
Yes	6	30
No	14	70
Total	20	100

7d. Did you speak with a person when you called them back?

Response	Number	Percent
Yes	4	57
No	3	43
Total	7	100

8. Overall, did you feel that the person(s) who talked with you listened carefully to what you wanted?

Response	Number	Percent
Yes, definitely	428	82
Yes, I think so	81	15
No, I don't think so	14	3
No, definitely not	1	0
Total	524	100

8a. Overall, did you feel that the person(s) who talked with you understood what you wanted?

Response	Number	Percent
Yes, definitely	430	82
Yes, I think so	76	15
No, I don't think so	17	3
Total	523	100

9. Did she/he explain things to you in a way that you could understand?

Response	Number	Percent
Yes, definitely	434	83
Yes, I think so	70	13
No, I don't think so	15	3
No, definitely not	1	0
Total	520	100

9a. What kind of problems did you have?

Response	Number	Percent
Language problem	0	0
Hearing problem	0	0
Don't remember	1	9
Others	10	91

10. Overall, did you receive the information from [NAME OF I & A SERVICE] that you were looking for?

Response	Number	Percent
Yes, definitely	351	67
Yes, I think so	107	20
No, I don't think so	47	9
No, definitely	17	3
Total	522	100

11. Were you given names of any other places to call?

Response	Number	Percent
Yes	243	47
No	258	50
N/A	17	3
Total	518	100

11a. Did you contact them?

Response	Number	Percent
Yes	199	79
No	53	21
Total	252	100

11b. Why not?

Responses	Number	Percent
Haven't had a chance to yet	35	67
I tried to, but haven't heard from them yet	1	2
I got help from somewhere else	5	10
Other	11	21
Total	52	100

11c. Did you start receiving services from any of the places you were referred to?

Response	Number	Percent
Yes	110	50
No	108	50
Total	218	100

12. Have you made any other calls on your own to get the information or help you needed?

Response	Number	Percent
Yes	87	17
No	422	83
Total	509	100

12a. Did you get the information or help you needed?

Response	Number	Percent
Yes	29	31
No	65	69
Total	94	100

12b. About how many calls did you have to make before you got the information or help you needed? in resolving the issue you called about?

Response	Number	Percent
1	6	24
2	14	56
3	4	16
4	1	4
Total	25	100

13. Do you expect that the information you received from [NAME OF I & A SERVICE] will be helpful

Response	Number	Percent
Yes, definitely	276	59
Yes, I think so	145	31
No, I don't think so	42	9
No, definitely not	7	1
Total	470	100

15. Would you recommend this service to a friend or colleague who needs the kind of information and assistance you did?

Response	Number	Percent
Yes, definitely	374	71
Yes, I think so	111	21
No, I don't think so	32	6
No, definitely not	13	2
Total	530	100

16. Do you have any recommendations on how to make the [NAME OF I & A SERVICE] better?

Response	Number	Percent
None	402	75
Increase the hours the service is available	0	0
Reduce the waiting time to speak to someone	6	1
Eliminate voice mail system/have persons answer the phone	8	2
The persons who answer the phone should be more knowledgeable	50	9
Try to answer all questions on the first call	14	3
Be more timely in returning phone calls	27	5
Other	70	13

Demographics

1. Where is your home located? Would you say . . .

Home Location	Number	Percent
In a city	157	46
In the suburbs of a city	58	17
In a small town or rural area	123	36
Total	338	100

2. What is your zip code?

3. What is your data of birth?

Average Age = 67 years

4. What is your gender?

Gender	Number	Percent
Male	115	23
Female	376	77
Total	491	100

5. Which of the following statements describes your living arrangements?

Living Arrangement	Number	Percent
I live alone.	134	37
I live with my spouse.	141	38
I live with my children.	43	12
I live with other persons.	47	13
Total	365	100

6. What is your highest educational level?

Educational Level	Number	Percent
Less than High School Diploma	32	10
High School Diploma	175	55
Some college, including Associate degree	77	24
Bachelor's Degree	22	7
Some post-graduate work or advanced degree c	12	4
Total	318	100

7. What is your race?

Race	Number	Percent
White or Caucasian	256	79
Black or African American	26	8
American Indian or Alaskan Native	7	2
Native Hawaiian or Other Pacific Islander	0	0
Other	37	11
Total	326	100

8. Are you of Hispanic origin?

Hispanic	Number	Percent
Yes	19	6
No	292	94
Total	311	100

9. What was the total combined income for all persons in your household during the past 12 months, including income from jobs, Social Security, retirement income, public assistance, and all other sources?

Income Level	Number	Percent
Less than \$5,000	6	3
\$5,001 – \$8,350	35	15
\$8,351 – \$11,250	36	16
\$11,251 – \$14,150	31	14
\$14,151 – \$20,000	35	15
\$20,001 – \$35,000	53	23
\$35,001 – \$50,000	11	5
\$50,001 or more	21	9
Total	228	100

Figure C-1

Services Efficiency and Reliability Average Items Scores by Location

Item	Average Scores	
	Urban	Rural
When you called the elder helpline last week, did you get a non busy signal?	93%	96%
Was your call answered quickly?	90%	91%
Was the phone answered by a person?	89%	93%
Did you understand the voice mail instructions?	91%	100%
I did not leave a message.	85%	88%
Average score for service efficiency and reliability	90%	94%

Figure C-2
Information Specialist Evaluation Average Items Scores by Location

*Item	Average Scores	
	Urban	Rural
Overall, did you feel that the person(s) who talked with you listened carefully to what you want?	95%	100%
Overall, did you feel that the person(s) who talked with you understood what you wanted?	95%	99%
Did she/he explain things to you in a way that you could understand?	94%	99%
Average score for information specialist evaluation	95%	99%

*The two respond categories "Yes, definitely" and "Yes I think so" were combined for each item.

Figure C-3
Referral Help and Utilization Average Items Scores by Location

Item	Average Scores	
	Urban	Rural
Overall, did you receive the information from elder helpline that you were looking for?	84%	88%
Did you contact them?	83%	76%
Did you start receiving services from any of the places you were referred to?	46%	46%
About how many calls did you have to make before you got the information or help you needed?	25%	75%
Do you expect that the information you received from elder helpline will be helpful in resolving the issue you call for?	88%	91%
Average score for referral and help utilization	65%	75%

Figure C-4

Overall Experiences and Satisfaction Average Items Scores by Location

*Item	Average Scores	
	Urban	Rural
Overall, how satisfied were you with the way your call was handled?	88%	93%
Would you recommend this service to a friend or colleague who needs the kind of information and assistance you did?	89%	93%
Average score for overall experiences and satisfaction	89%	93%

*The two respond categories "Yes, definitely" and "Yes I think so" were combined for each item.

Figure C-5
Average Quality Scores Urban and Rural

Item	Average Scores	
	Urban	Rural
Average quality score for service efficiency and reliability	90%	94%
Average quality score for information specialist evaluation	95%	99%
Average quality score for referral and help utilization	65%	75%
Average quality score for overall experiences and satisfaction	89%	93%