

**Client Satisfaction/Program Evaluation Report for  
CCE, HCE, and ADI**

**Area Agency on Aging of Pasco-Pinellas, Inc.**

**Fall 2017**

Per the Area Agency on Aging of Pasco-Pinellas, Inc.'s Client Satisfaction/Program Evaluation Procedure, surveys were mailed to a random sample of 200 active clients in the CCE, HCE, ADI programs. The Case Management survey and cover letter mailed on September 5<sup>th</sup>, 2017, resulted in an overall response rate of 29%, which is a decrease from the 2016 rate of 44%. A total of 57 surveys were returned. One likely explanation for the lower response rate in 2017 is less response as a result of disruptions such as loss of power and evacuations that were caused by Hurricane Irma. The hurricane occurred on September 10<sup>th</sup>, 2017 while the surveys were sent out to clients on September 5<sup>th</sup>, 2017. Results of the surveys were analyzed by funding source, provider, and overall combined results for all providers and funding sources. Results to each question by funding source and provider can be found in the Appendix. Table 1A below outlines the overall combined provider and funding source results to each question for all returned surveys in 2017 and 2016 respectively.

Table 1A: Results for all Case Managed Programs - 2017							
All	57						
Survey Questions	# of Yes	% Yes	# of No	% No	# Blank	% Blank	
1 Do you know who your case manager is?	57	100%	0	0%	0	0%	
2 Are you satisfied with your case manager?	53	93%	4	7%	0	0%	
3 Does your case manager follow-up with your needs?	53	93%	2	4%	2	4%	
4 Does your case manager return your calls promptly?	53	93%	2	4%	2	4%	
5 Is your case manager courteous and respectful?	54	95%	2	4%	1	2%	
6 Do you know who to call if you have a complaint or problem?	51	89%	4	7%	2	4%	
7 Are the services you are receiving meeting your needs?	48	84%	4	7%	5	9%	
8 Were you able to help decide what services you receive?	50	88%	4	7%	3	5%	
9 Are you satisfied with the vendors providing your in home services?	52	91%	10	18%	2	4%	
10 Do you have any recommendations for improving services?	17	30%	28	49%	5	9%	

Table 1A: Results for all Case Managed Programs - 2016							
All	87						
Survey Questions	# of Yes	% Yes	# of No	% No	# Blank	% Blank	
1 Do you know who your case manager is?	86	99%	1	1%	0	0%	
2 Are you satisfied with your case manager?	83	95%	1	1%	3	3%	
3 Does your case manager follow-up with your needs?	83	95%	2	2%	2	2%	
4 Does your case manager return your calls promptly?	79	91%	3	3%	5	6%	
5 Is your case manager courteous and respectful?	85	98%	0	0%	2	2%	
6 Do you know who to call if you have a complaint or problem?	78	90%	6	7%	3	3%	
7 Are the services you are receiving meeting your needs?	77	89%	6	7%	4	5%	
8 Were you able to help decide what services you receive?	81	93%	2	2%	5	6%	
9 Are you satisfied with the vendors providing your in home services?	78	90%	2	2%	7	8%	
10 Do you have any recommendations for improving services?	18	21%	65	75%	4	5%	

Overall satisfaction was analyzed utilizing survey questions 2-5 and 7-9. Questions 1, 6, and 10 were excluded, as they were not indicators of client satisfaction. The overall satisfaction results by provider are found in the Appendix. The results for overall satisfaction for all providers combined in 2017 and 2016 can be seen in Table 2A below.

<b>Table 2A: Overall Satisfaction for All Providers in PSA 5 - 2017</b>	
Based on Questions- 2, 3, 4, 5, 7, 8, 9	
*Responses of Yes indicate Satisfaction	
<b>Overall Satisfaction Questions</b>	<b>Yes</b>
2 Are you satisfied with your case manager?	93%
3 Does your case manager follow-up with your needs?	93%
4 Does your case manager return your calls promptly?	93%
5 Is your case manager courteous and respectful?	95%
7 Are the services you are receiving meeting your needs?	84%
8 Were you able to help decide what services you receive?	88%
9 Are you satisfied with the vendors providing your in home services?	91%
<b>Overall Client Satisfaction</b>	
<b>90.98%</b>	

<b>Table 2A: Overall Satisfaction for All Providers in PSA 5 - 2016</b>	
Based on Questions- 2, 3, 4, 5, 7, 8, 9	
*Responses of Yes indicate Satisfaction	
<b>Overall Satisfaction Questions</b>	<b>Yes</b>
2 Are you satisfied with your case manager?	95%
3 Does your case manager follow-up with your needs?	95%
4 Does your case manager return your calls promptly?	90.80%
5 Is your case manager courteous and respectful?	98%
7 Are the services you are receiving meeting your needs?	89%
8 Were you able to help decide what services you receive?	93%
9 Are you satisfied with the vendors providing your in home services?	90%
<b>Overall Client Satisfaction</b>	
<b>92.94%</b>	

The overall satisfaction rate for all providers, which was based on the average of included questions with answers of “yes”, resulted in 90.98% satisfaction in 2017 versus 92.94% satisfaction in 2016, a decrease of 1.96%. However, the two Lead Agencies also had differing results with Gulf Coast’s overall

satisfaction increasing from 93.23% in 2016 to 97.06% in 2017, and Cares Inc.'s overall satisfaction decreasing from 92.38% in 2016 to 81.99% in 2017. The first year the survey was implemented in 2007, the overall satisfaction rate was 85.38%. When the current 2017 results are compared to the 2007 results, the overall improvement rate is 5.60%.

The final component analyzed was overall program evaluation. Overall program evaluation utilized questions 1-9 from the survey. Question 10 was excluded because it is a question requesting recommendations for improving services, and frequently left blank or answered as "no". The results of the overall program evaluation by provider can be seen in the Appendix. The analysis of program evaluation for all providers combined in 2017 and in 2016 is found in Table 3A below.

<b>Table 3A: Overall Program Evaluation for All Providers in PSA 5 - 2017</b>	
Based on Questions 1-9	
*Responses of Yes indicate compliance with programmatic requirements.	
Overall Program Questions	Yes
1 Do you know who your case manager is?	100%
2 Are you satisfied with your case manager?	93%
3 Does your case manager follow-up with your needs?	93%
4 Does your case manager return your calls promptly?	93%
5 Is your case manager courteous and respectful?	95%
6 Do you know who to call if you have a complaint or problem?	89%
7 Are the services you are receiving meeting your needs?	84%
8 Were you able to help decide what services you receive?	88%
9 Are you satisfied with the vendors providing your in home services?	91%
<b>Overall Program Evaluation</b>	<b>91.81%</b>

<b>Table 3A: Overall Program Evaluation for All Providers in PSA 5 - 2016</b>	
Based on Questions 1-9	
*Responses of Yes indicate compliance with programmatic requirements.	
Overall Program Questions	Yes
1 Do you know who your case manager is?	99%
2 Are you satisfied with your case manager?	95%
3 Does your case manager follow-up with your needs?	95%
4 Does your case manager return your calls promptly?	91%
5 Is your case manager courteous and respectful?	98%
6 Do you know who to call if you have a complaint or problem?	90%
7 Are the services you are receiving meeting your needs?	89%
8 Were you able to help decide what services you receive?	93%
9 Are you satisfied with the vendors providing your in home services?	90%
<b>Overall Program Evaluation</b>	<b>93.23%</b>

The overall program evaluation rate, utilizing the average of included questions with the answers of “yes”, for all providers in 2017 resulted in 91.81% compliance versus 93.23% compliance in 2016, a decrease of 1.42% in 2017. Again, the two Lead Agencies had different results with Gulf Coast’s overall compliance increasing from 93.57% in 2016 to 97.06% in 2017, and Cares Inc.’s overall compliance decreasing from 92.59% in 2016 to 84.06% in 2017.

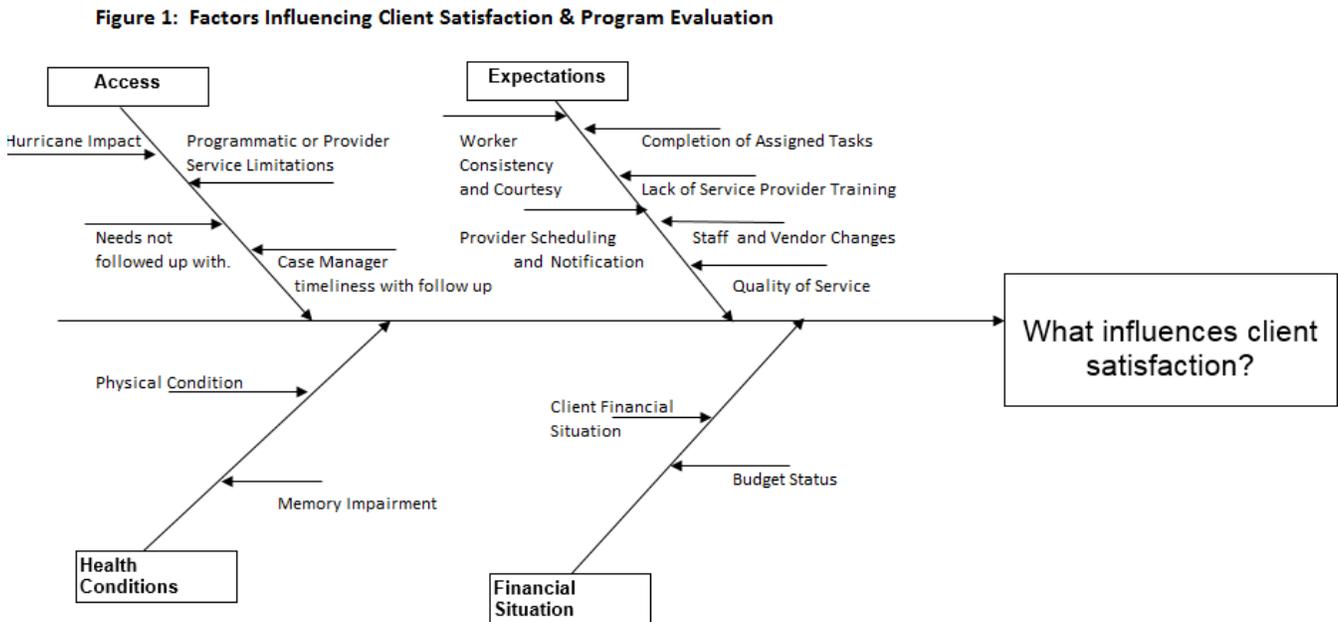
Based on the 2016 results, the identified areas for improvement included ensuring services are meeting client needs, client satisfaction with vendors providing in home services, ensuring case managers return client calls promptly, and increasing awareness of grievance procedures when complaints or problems arise. These four items were targeted for improvement due to their overall “yes” responses being below the overall satisfaction and program evaluation rates.

The 2017 results showed a similar outcome. Based on the same methodology used in prior survey years to determine the targeted areas of improvement, the identified areas include ensuring satisfaction with case manager, ensuring case managers are following up on clients’ needs, ensuring case manager is courteous and respectful, increasing awareness of grievance procedures when complaints or problems arise, and ensuring clients are offered choice and are included in the care planning process.

The primary difference between the results in 2017 and 2016 is decline in five areas in the 2017 results after the results showed improvement in all areas in 2016. Historically, the question, “Does the case manager return your calls promptly?” had been an issue in 2014 as it had back in 2007 and 2010, however improvement was noted in the 2016 by 5% and continued to improve in 2017 by 2%. The questions “Are you satisfied with the vendors providing your in home services?” and “Do you know who your case manager is?” each showed improvement of 1%. The areas that showed the largest declines

were “Were you able to decide what services you receive?” by 5%, “Are the services you are receiving meeting your needs?” by 5%, and “Is your case manager courteous and respectful?” by 3%.

Figure 1 on page 5, reflects the fish bone diagram that outlines the factors contributing to the overall satisfaction and program evaluation rates based on the 2017 survey results.



The primary factors included access to care, expectations about care, health conditions, and financial situation. Clients’ needs not being met was expressed in several surveys with comments reflecting need for additional services. Needs not being addressed could be related to the timeliness of case manager follow up, timeliness of vendor staffing or clients not expressing their needs to their case managers. The second factor impacting access is programmatic or provider service limitations. Programmatic service limitations often limit access to services clients need or desire limiting their ability to remain in their homes and decreasing client satisfaction. Additional factor, Hurricane Impact was added in 2017 due to the impact of Hurricane Irma on clients. Several clients made comments regarding services that were impacted or additional services recommended due to the hurricane such as

scheduled aides unable to come out during the hurricane, requesting water be delivered prior to a hurricane and assistance with downed trees.

The expectations clients have regarding the worker consistency, staff and vendor changes, courtesy, provider scheduling and notification, service provider training, completion of assigned tasks, as well as quality of services directly impact client satisfaction. Clients have individual expectations about the care they receive. If those expectations are not met, client satisfaction is less likely to be achieved. In the 2012 and 2014 surveys, lack of service provider training was a concern noted, but did not continue to be an issue based on comments made by clients in 2016 or in 2017. Provider scheduling and notification as well as quality of services have remained issues from 2008 to 2016. However, in 2017, results show a small improvement of 1% in client satisfaction with vendors.

Health conditions also significantly impact client satisfaction. A several surveys returned in 2017 did not have answers clearly marked, or were left blank. This is noted as a trend in all survey years completed to date. This could be the result of clients having physical limitations such as vision problems, preventing them from accurately answering the questions. Clients who have memory problems may also have difficulty answering questions on surveys as they may be unable to recall the name of their case manager, the program documents and policies reviewed with them or if their case manager has followed up with his or her needs. Health conditions may result in decreased result accuracy when measuring client satisfaction and program evaluation.

The final factor impacting client satisfaction is financial situation. Since the survey was developed in 2007, there have consistently been a few comments regarding needing additional services and budget constraints. If clients disclosed their names on the surveys, the information was passed along to the lead agencies to follow up on. Clients' individual financial situations may change their outlook on life,

indirectly impacting satisfaction, whereas the overall state financial situation directly impacts the amount of services clients are able to receive therefore decreasing client satisfaction.

To address the factors leading to client satisfaction and the areas identified for improvement, continued training and oversight by the AAAPP to the lead agencies is needed. A report detailing the results of the surveys, including written comments by the clients will be submitted to each lead agency. The reports will identify overall satisfaction, overall program evaluation and the areas for improvement. The combined results for all providers will also be included in the report to allow a method of comparison among all providers.

During 2017, the lead agencies have worked on improving the areas targeted in 2016. The 2017 survey, when compared with the 2016 survey, showed declines in some areas that will require additional attention in 2018. As in prior years, the areas of improvement identified in 2017 that showed results that were less than the overall program evaluation and client satisfaction rates, will be discussed with all providers. Technical assistance and monitoring by the AAAPP will be provided over the next year to focus on the identified areas. A checklist specific to the results of each agency will again be utilized to improve the identified areas and training will continue to include focus on these areas.

Despite small overall decline in 2017, the case management survey results and program evaluation process has continued to show improvement since the first surveys were sent in 2007. With increased awareness regarding factors influencing client satisfaction and by addressing the identified areas of concern, improvement in overall satisfaction are expected. Having a program evaluation plan will continue to assist the AAAPP in improving the quality and access of services to ensure clients are receiving the care necessary to reduce the risk of nursing home placement.

## Appendix

All Provider- Combined Results by Funding 2017						
HCE	6					
Survey Questions	# of Yes	% Yes	# of No	% No	# Blank	% Blank
1 Do you know who your case manager is?	6	100%	0	0%	0	0%
2 Are you satisfied with your case manager?	6	100%	0	0%	0	0%
3 Does your case manager follow-up with your needs?	6	100%	0	0%	0	0%
4 Does your case manager return your calls promptly?	6	100%	0	0%	0	0%
5 Is your case manager courteous and respectful?	6	100%	0	0%	0	0%
6 Do you know who to call if you have a complaint or problem?	6	100%	0	0%	0	0%
7 Are the services you are receiving meeting your needs?	6	100%	0	0%	0	0%
8 Were you able to help decide what services you receive?	5	83%	0	0%	1	17%
9 Are you satisfied with the vendors providing your in home services?	6	100%	0	0%	0	0%
10 Do you have any recommendations for improving services?	3	50%	3	50%	0	0%
ADI	9					
Survey Questions	# of Yes	% Yes	# of No	% No	# Blank	% Blank
1 Do you know who your case manager is?	9	100%	0	0%	0	0%
2 Are you satisfied with your case manager?	9	100%	0	0%	0	0%
3 Does your case manager follow-up with your needs?	9	100%	0	0%	0	0%
4 Does your case manager return your calls promptly?	9	100%	0	0%	0	0%
5 Is your case manager courteous and respectful?	9	100%	0	0%	0	0%
6 Do you know who to call if you have a complaint or problem?	9	100%	0	0%	0	0%
7 Are the services you are receiving meeting your needs?	9	100%	0	0%	0	0%
8 Were you able to help decide what services you receive?	9	100%	0	0%	0	0%
9 Are you satisfied with the vendors providing your in home services?	9	100%	7	78%	0	0%
10 Do you have any recommendations for improving services?	0	0%	2	22%	0	0%
CCE	42					
Survey Questions	# of Yes	% Yes	# of No	% No	# Blank	% Blank
1 Do you know who your case manager is?	42	100%	0	0%	0	0%
2 Are you satisfied with your case manager?	38	90%	4	10%	0	0%
3 Does your case manager follow-up with your needs?	38	90%	2	5%	2	5%
4 Does your case manager return your calls promptly?	38	90%	2	5%	2	5%
5 Is your case manager courteous and respectful?	39	93%	2	5%	1	2%
6 Do you know who to call if you have a complaint or problem?	36	86%	4	10%	2	5%
7 Are the services you are receiving meeting your needs?	33	79%	4	10%	5	12%
8 Were you able to help decide what services you receive?	36	86%	4	10%	2	5%
9 Are you satisfied with the vendors providing your in home services?	37	88%	3	7%	2	5%
10 Do you have any recommendations for improving services?	14	33%	23	55%	5	12%

**Results by Provider Fall 2017**

GC	34						
Survey Questions	# of Yes	% Yes	# of No	% No	# Blank	% Blank	
1 Do you know who your case manager is?	34	100%	0	0%	0	0%	
2 Are you satisfied with your case manager?	34	100%	0	0%	0	0%	
3 Does your case manager follow-up with your needs?	34	100%	0	0%	0	0%	
4 Does your case manager return your calls promptly?	34	100%	0	0%	0	0%	
5 Is your case manager courteous and respectful?	34	100%	0	0%	0	0%	
6 Do you know who to call if you have a complaint or problem?	32	94%	2	6%	0	0%	
7 Are the services you are receiving meeting your needs?	31	91%	1	3%	2	6%	
8 Were you able to help decide what services you receive?	32	94%	1	3%	1	3%	
9 Are you satisfied with the vendors providing your in home services?	32	94%	9	26%	0	0%	
10 Do you have any recommendations for improving services?	10	29%	17	50%	0	0%	
Cares	23						
Survey Questions	# of Yes	% Yes	# of No	% No	# Blank	% Blank	
1 Do you know who your case manager is?	23	100%	0	0%	0	0%	
2 Are you satisfied with your case manager?	19	83%	4	17%	0	0%	
3 Does your case manager follow-up with your needs?	19	83%	2	9%	2	9%	
4 Does your case manager return your calls promptly?	19	83%	2	9%	2	9%	
5 Is your case manager courteous and respectful?	20	87%	2	9%	1	4%	
6 Do you know who to call if you have a complaint or problem?	19	83%	2	9%	2	9%	
7 Are the services you are receiving meeting your needs?	17	74%	3	13%	3	13%	
8 Were you able to help decide what services you receive?	18	78%	3	13%	2	9%	
9 Are you satisfied with the vendors providing your in home services?	20	87%	1	4%	2	9%	
10 Do you have any recommendations for improving services?	7	30%	11	48%	5	22%	

<b>Table 2: Overall Satisfaction by Provider - 2017</b>				
*Omits questions 1, 6, 10				
GC		34		
	Overall Satisfaction Questions		Yes	%
	2 Are you satisfied with your case manager?		34	100%
	3 Does your case manager follow-up with your needs?		34	100%
	4 Does your case manager return your calls promptly?		34	100%
	5 Is your case manager courteous and respectful?		34	100%
	7 Are the services you are receiving meeting your needs?		31	91%
	8 Were you able to help decide what services you receive?		32	94%
	9 Are you satisfied with the vendors providing your in home services?		32	94%
			<b>Overall Client Satisfaction</b>	
			<b>97.06%</b>	
Cares		23		
	Overall Satisfaction Questions		Yes	%
	2 Are you satisfied with your case manager?		19	83%
	3 Does your case manager follow-up with your needs?		19	83%
	4 Does your case manager return your calls promptly?		19	83%
	5 Is your case manager courteous and respectful?		20	87%
	7 Are the services you are receiving meeting your needs?		17	74%
	8 Were you able to help decide what services you receive?		18	78%
	9 Are you satisfied with the vendors providing your in home services?		20	87%
			<b>Overall Client Satisfaction</b>	
			<b>81.99%</b>	

**Table 3: Program Evaluation By Provider - 2017**

*Omits question 10				
GC		34		
	Overall Evaluation Questions		Yes	%
1	Do you know who your case manager is?		34	100%
2	Are you satisfied with your case manager?		34	100%
3	Does your case manager follow-up with your needs?		34	100%
4	Does your case manager return your calls promptly?		34	100%
5	Is your case manager courteous and respectful?		34	100%
6	Do you know who to call if you have a complaint or problem?		32	94%
7	Are the services you are receiving meeting your needs?		31	91%
8	Were you able to help decide what services you receive?		32	94%
9	Are you satisfied with the vendors providing your in home services?		32	94%
			<b>Overall Program Evaluation</b>	
			<b>97.06%</b>	
Cares		23		
	Overall Evaluation Questions		Yes	%
1	Do you know who your case manager is?		23	100%
2	Are you satisfied with your case manager?		19	83%
3	Does your case manager follow-up with your needs?		19	83%
4	Does your case manager return your calls promptly?		19	83%
5	Is your case manager courteous and respectful?		20	87%
6	Do you know who to call if you have a complaint or problem?		19	83%
7	Are the services you are receiving meeting your needs?		17	74%
8	Were you able to help decide what services you receive?		18	78%
9	Are you satisfied with the vendors providing your in home services?		20	87%
			<b>Overall Program Evaluation</b>	
			<b>84.06%</b>	