

DESIGNING AN APPROPRIATE EVALUATION TOOL FOR UNDERSTANDING ORGANIZATIONAL IMPACT ON PHYSICIAN HEALTH

2019 EAPH CONFERENCE

Elizabeth Brooks, PhD

Sarah R Early, PsyD



Colorado Physician Health Program

TODAY'S WORKSHOP

- ▶ We will guide you through a 6-step process of designing a client exit survey

6-STEP PROCESS TO DEVELOP SURVEY FRAMEWORK

- ▶ Step 1: Survey objective
 - ▶ **Activity 1**
- ▶ Step 2: Consider survey administration issues
- ▶ Step 3 & 4: Survey Domains and Domain categories
 - ▶ **Activity 2**
- ▶ Step 5: Draft survey questions and response options
 - ▶ **Activity 3**
- ▶ Step 6: Finalize survey questions and response options
 - ▶ **Activity 4**

SURVEY OVERVIEW

Benefits of client surveys

- Help with strategic planning
- Build client investment
- To meet licensing/credentialing requirements
- Inform outcomes for performance-based payments

Colorado Physician Health Program Exit Survey

- Client Exit survey = a survey completed at the end of a program; typically measures program impact and client satisfaction
- CPHP Program Evaluation in 2014
 - Needed a more sensitive measure to understand how we help clients and where we need to improve

STEP 1: SURVEY OBJECTIVE

Understanding the intent of your exit survey is critical.

- Prior to creating the survey tool, discuss the value of surveying clients with program administrators, clinicians, other staff, and researchers

Ask:

- Why is a client exit survey important to our organization?
- How will we use the results?
- Who would benefit from the results?

ACTIVITY 1: SURVEY OBJECTIVE



- On your survey template, **go to: Activity 1: Survey Purpose**
 - There are many ways a client exit survey can help an organization. Thinking about the needs of your organization, select the objectives that are **most important** to meet from your organization's perspective. Feel free to add others.

STEP 2: CONSIDER SURVEY LOGISTICAL CONSIDERATIONS

The tool you develop will be impacted by a number of factors. Before you begin your survey, think about:

- Survey distribution (online, mail, phone)
- Confidentiality and coercion
- Survey length
- Where you will store the data in the long term
- How you will analyze the data
- How much your organization can spend on the survey in the short and long-term

STEP 3 & 4: SURVEY DOMAINS AND DOMAIN CATEGORIES

After you have determined the objective(s) of your survey and considered the logistics, Steps 3 & 4 are to define the survey domains and domain categories.



STEPS 3 & 4: SURVEY DOMAINS AND DOMAIN CATEGORIES

➤ Client participation outcomes

- Personal outcomes
- Professional outcomes
- Interpersonal outcomes



➤ Client satisfaction

- Satisfaction with specific services
- Satisfaction with confidentiality
- Satisfaction with providers



STEP 3 & 4: CREATE SURVEY DOMAINS AND CATEGORIES

Clearly defining your survey domains and domain categories helps to:

- Ensure that you are capturing the information you want to capture
- Balance the number of questions under each domain
 - Important when adjusting survey length
 - Important for establishing some validity measures
- Think critically about the importance of each question

ACTIVITY 2: SURVEY DOMAINS AND DOMAIN CATEGORIES



- Under Activity 2, check which survey domains and domain categories you will collect. Feel free to add other options.
- Note, the survey domains and domain categories you selected should help to meet the program objectives you selected in Activity 1.

The way questions are worded in surveys matter. For the next set of slides, select which wording is better.

The objective of this question is to document which services a client used regularly. Which wording is better?

Did you attend any of the recommended support services regularly?

A

Which recommended support services did you attend at least 3 times in the last year?

B

The objective of this question is to determine if support services should be provided by the program.

Which wording is better?

Agree or disagree: I believe that support services should be offered by the program.

A

Yes or No: Do you disagree that support services should not be offered by the program?

B

The objective of this question is to learn whether a client stayed away from alcohol in the past year.

Which question wording is better?

How often did you use alcohol last year?

A

Did you adhere to the terms of your treatment contract by refraining from alcohol last year?

B

The objective of this question is to understand a client's use of support services.

Which wording is better?

Did you participate in support groups and individual counseling activities?

A

Did you participate in support groups?

B

Did you participate in individual counseling?

C

The objective of this question is to assess the client's expectations for services.

Which wording is better?

Don't you agree that support services after 5:00 pm would improve access?

A

How important is it for support services to be available after 5:00 pm?

B

The objective of this question is to record the income level of participants.

Which wording is better?

In which of the following categories does your last year's annual income best fit? \$40,000 - \$60,000; \$61,000-80,000; 81,000 - 100,000

A

How much do you earn each year?

B

STEP 5: DRAFT SURVEY QUESTIONS AND RESPONSE OPTIONS

Careful construction of survey questions is critical:

- Begin by brainstorming several questions under each domain category
- Review and eliminate questions in order to keep survey short and on topic

RESPONSE OPTIONS

Constructing the appropriate response options is vital.

Dichotomous pairs **Yes/No** **True/False**

- Good for capturing specific information of interest but may be too limiting and not give you the detail of information you wanted

Multiple Choice **a) 2011** **b) 2012** **c) 2013**

- Useful if you would like to have respondents select from *known* alternatives but must know the alternatives and shouldn't have too many responses options

RESPONSE OPTIONS, CONT.

Check all the apply

- Alcoholics Anonymous
 - Individual counseling
 - Religious/spiritual care
- Useful when well-stated but be sure to provide several choices, including OTHER (please specify).
Does not allow measurement

Scales

Strongly agree Somewhat agree Neither agree nor disagree
Somewhat disagree Strongly disagree

- Respondents may interpret response options differently from one another

CHOOSING RESPONSE OPTIONS

When choosing response options, make sure that they are:

- Exhaustive
- Mutually Exclusive
- Relevant to the question
- Consistent

ACTIVITY 3: SURVEY QUESTIONS AND RESPONSE OPTIONS



- For Activity 3, select 1 survey domain.
- Write three questions and response options on your worksheet for each of the Domain Categories (for up to 2 Domain Categories)

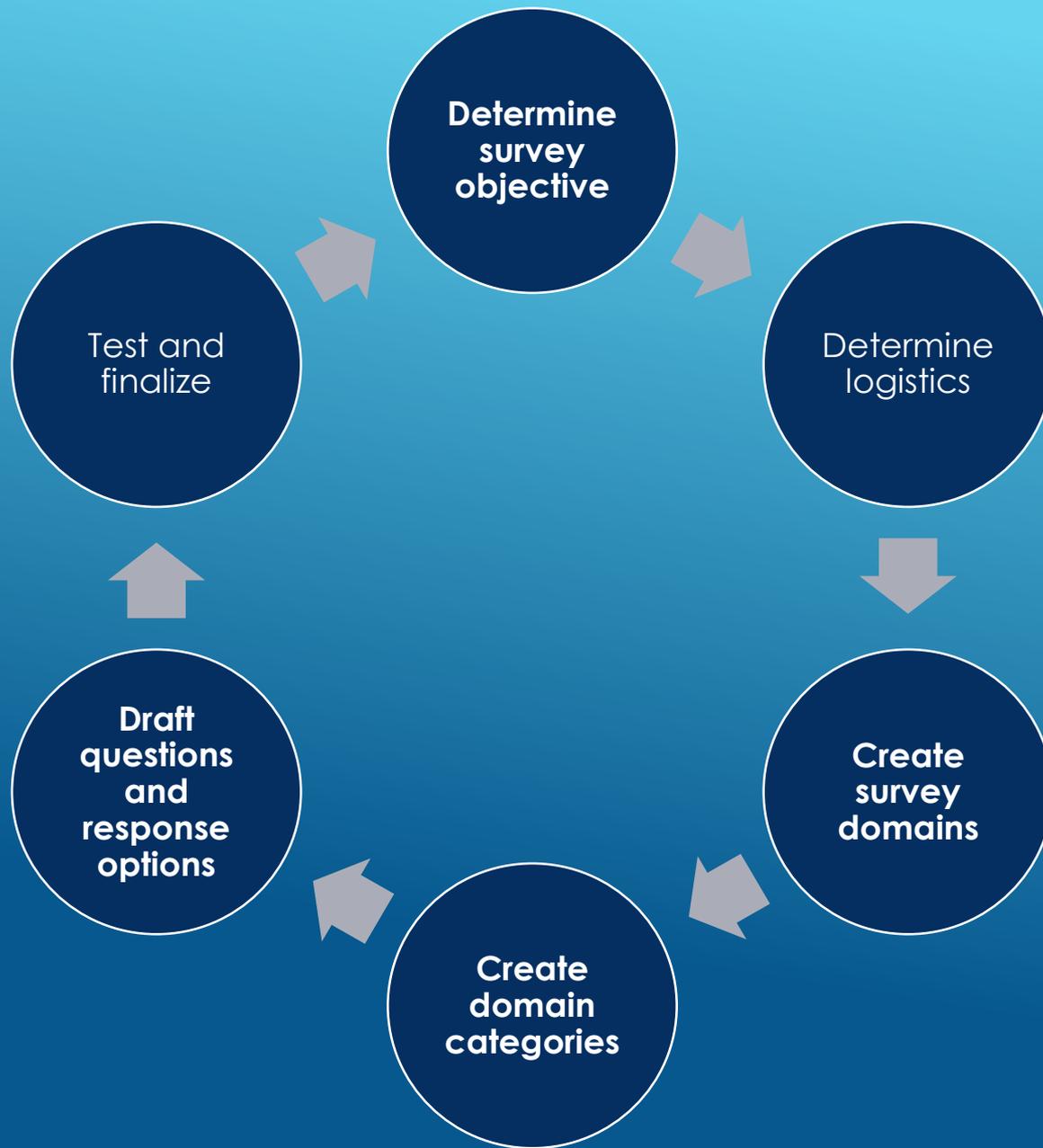
STEP 6: FINALIZE SURVEY QUESTIONS AND RESPONSE OPTIONS

- Once you draft a set of questions, test and re-write them, as needed
- Validity and reliability testing

ACTIVITY 4: TEST AND FINALIZE SURVEY



- For Activity 4, pair up with a person next to you.
- Take turns reading aloud and answering your survey questions.
- As the responder, think about:
 - Did the survey questions make sense?
 - Was the intent of the question clear?
 - What suggestions do you have for your partner that would improve the questions?
 - Do the questions adequately reflect what information was needed for that Survey Domain?



QUESTIONS?

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TIPS FOR YOUR QUESTIONNAIRE

Include only questions relevant to the survey's purpose and will be useful for analysis

- Make the questionnaire appealing
- Keep it short but include what is necessary
- Limit use of open-ended questions
- Ensure anonymity and confidentiality
- Avoid questions that look or seem alike

QUESTION ORDER MATTERS

Natural Time Sequence

- Most familiar to least familiar
- Sensitive questions later
- Easy questions last
- Open-ended questions near the end

WORKSHOP OBJECTIVES

- Recognize how to use a systematic, **6-step process** as the framework for survey design
- Identify best practices in survey questions
- Identify common pitfalls in quality improvement activities