2017 SMP/SHIP National Conference
JULY 10–13, 2017    AUSTIN, TX

ACL SHIP and SMP Beneficiary Satisfaction Surveys

Introduction and Orientation
Presented by CG Strategy
What You’ll Learn

1. What is a beneficiary satisfaction survey?
2. Why are SMP and SHIP each conducting one?
3. Who will participate in the surveys?
4. What is the timeline for the surveys and how will they be administered?
5. What does the survey mean for me?
6. What are the next steps?
Overview

Beneficiary Satisfaction Surveys

Continuous Program Improvement

Beneficiary Experience Improvement

Regulatory Compliance

Performance Monitoring Commitment

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# SHIP & SMP Survey Participation

## FEATURES

**Survey Focus**
- Counseling

**Survey Participants**
- Counselees
- Phone bank

**Survey Method**
- Presentation (outreach)
- Presentation Attendees
- Voluntary comment cards

**Key Features**
- Anonymous
- Representative
- National Conclusions
- State/Territory Conclusions
- Statistically Valid

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High-level Timeline

- 2016
  - Survey Design
  - Survey Pilot Testing

- 2017
  - OMB Clearance
  - Survey Preparation
  - 1st Survey Administration

- 2018
  - Year 1 Reporting
  - 2nd Survey Administration

- 2019
  - Year 2 Reporting
  - 3rd Survey Administration
  - Year 3 Reporting
  - National-Level Reporting
### Detailed Timeline

<table>
<thead>
<tr>
<th>FEATURES</th>
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<tbody>
<tr>
<td><strong>Total Duration</strong></td>
<td>• Three years</td>
</tr>
<tr>
<td><strong>Annual Activity</strong></td>
<td>• Three years</td>
</tr>
<tr>
<td>• Two administration periods per year</td>
<td>• One ongoing administration period, up to six months per year</td>
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<tr>
<td>1. One week in Spring/Summer</td>
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<tr>
<td>2. One week in Open Enrollment Period</td>
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<tr>
<td><strong>State/Territory Participation</strong></td>
<td>• 17-18 States/Territories per year</td>
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<tr>
<td>• 18 States/Territories per year</td>
<td>• Each State/Territory participates once over three-year survey period</td>
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<tr>
<td>• Each State/Territory participates once over three-year survey period</td>
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<tr>
<td><strong>Beneficiary Participation</strong></td>
<td>• Beneficiaries surveyed once</td>
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# Impact and Assistance

<table>
<thead>
<tr>
<th>FEATURES</th>
<th>Support Provided</th>
<th>State Involvement (Needs/Expectations)</th>
<th>Outputs</th>
</tr>
</thead>
</table>
| • SHIP training webinars  
• Respondent sampling  
• Results analysis and reporting | • SMP training webinars  
• Survey administration job aids  
• Event/response monitoring  
• Results analysis and reporting | • Coordinate event selection  
• Administer comment card survey | • National Report  
• State Reports |
| • Enter NPR data requirements:  
  ✓ First name  
  ✓ Last name  
  ✓ Phone number | | | |
| • National Report  
• State Reports | | | |

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Next Steps

1. Monitor email for additional information, including Year 1 announcements and training invitations.

2. For states/territories not participating in Year 1:
   a) Feel free to attend upcoming SMP/SHIP survey training events
   b) Please refrain from using survey materials until your state/territory is invited to participate
   c) Using materials in advance can bias future results at national and state/territory level