



Stakeholder Survey Instructions for Public and Private Organizations

Introduction

Stakeholder Surveys are used by COA Peer Reviewers to learn how key stakeholders perceive your organization and experience its services. They are an important source of evidence that peer reviewers use when determining the ratings for many standards.

General Instructions

- Organizations are expected to invite stakeholders to complete the surveys six months prior to their scheduled site visit.
- Two forms must be submitted with the self-study document, the **Stakeholder Survey Distribution Totals** form and the **Stakeholder Survey Recipients** List. The completed forms will be submitted with the organizations evidence for PQI 1. These forms can be found in the Related Files on the "How Do We Use the COA Questionnaires?" page of the Accreditation Guidelines.
- All stakeholder surveys will be conducted either by telephone or online. Hard copies of stakeholder surveys will not be accepted. COA does not have the capability to process paper surveys and aggregate the results.

Steps

1. The first step is to identify a sample of stakeholders to be surveyed. Follow the links above for more information on sampling stakeholders.
2. The next step is to invite the stakeholders you've identified to take the survey. This is typically done by email or by sending the invitation on organization letterhead by postal mail.
3. Specific instructions on how individual stakeholders can complete the surveys can be found on the following pages.

For each Survey, simply copy the text that has been provided and paste it into an email or your organization's letterhead.

The instructions are unique to your organization and are different for each type of Stakeholder Survey. Please be careful not to alter in any way the Toll-Free Number, Online Link, or Organization Code.

Online Links:

Survey links are case sensitive and must be sent exactly as they appear in the text to ensure that the person's response is correctly associated with your organization when it is sent to COA. If you copy and



paste the text, including the web link, into an email, the link will be a "hot" link, and people who receive the email will be able to access the survey simply by clicking on the link.

Telephone Surveys:

Please note that the voice that the person taking the survey will hear is computer-generated. COA is unable to change the way that your organization's name is pronounced.

Note: For stakeholders who you are unable to contact via email, it is strongly recommended that you only provide instructions for taking the telephone surveys. This will help minimize errors that occur when stakeholders incorrectly type the online links into their web browser.

- 4. Be sure to test all Survey Links and at least one of the toll-free phone numbers before sending them to stakeholders.

Telephone Surveys: After entering your organization code, enter the number "9" on your telephone keypad for each question in the survey. Include the comment "test" at the end of the survey. This will tell the review team that it was a test.

Online Surveys: Answer "Not Sure/Not Applicable" when answering the web survey questions and include a comment of "test" at the end of the survey.

- 5. If you need a phone or web survey translated into another language for a population that you are serving, see the instructions for translating surveys into other languages located in the Accreditation Guidelines directly below the link to this document.

Instructions Regarding Specific Stakeholder Surveys

Governing Body Survey

Advisory Body / Council Survey

Distribute COA's invitation for the **Governance Survey** and/or **Advisory Body / Council Survey** to each member of the governing body and/or advisory group, as applicable.

Note: Organizations having both governing and advisory bodies should distribute survey invitations to both groups.

Community Survey

The organization should complete the following steps:

1. Identify organizations/agencies/entities that fit the descriptions in the table below.
2. Distribute a COA survey invitation for the **Community Survey** to identified community stakeholders.
3. Provide the names of all organizations/agencies/entities that were provided the Community Survey to COA with the organization's completed Self-Study using the **Survey Recipients List** form.



✓	Suggested Recipients of the Community Survey
	Each organization or governmental entity with which your organization has a purchase-of-service contract .
	The public child welfare (city, county, state, or provincial), mental health (city, county, state, or provincial), substance abuse (city, county, state, or provincial), developmental disabilities/mental retardation (city, county, state, or provincial), juvenile justice, youth justice, criminal justice , or other authorities, as applicable to the services provided by the organization.
	All local, state, or provincial authorities responsible for regulating, licensing, or monitoring the organization.
	The local United Way of America.
	Organizations to which or from which consumers are most frequently referred.
	Colleges or universities with which the organization has a professional training arrangement (undergraduate or graduate).
	The local chapter (city, state, or provincial) of appropriate professional/membership organizations (e.g., National Association of Social Workers or American Psychological Association).
	Advocacy groups in the city, state, province, or community with a direct interest in the services provided by the organization or the well-being of consumers served by the organization.
	All foundations that have provided major support over the last four years.
	Other organizations that can help COA gain comprehensive and accurate information about the organization's role in the community.

Consumer Survey

Distribute COA's invitation for the **Consumer Survey** to current service recipients.

For Spanish-speaking consumers COA's electronic survey system (either on-line or by telephone) will provide the consumer with the questions in Spanish.

How many survey invitations should an organization distribute?

Organizations currently serving **200 or less** consumers should distribute survey invitations to **all** consumers. If the number of current consumers is **greater than 200**, distribute survey invitations to **at least 200** consumers, but **no more than 350** consumers.

Consumers are to be randomly selected from across the service/program population of the organization. The organization may choose its own means of random selection, but it must be prepared to explain its sampling method prior to or during the site visit.

Organizations providing **Adoption Services (AS)** or **Inter-Country Adoption Services (ICA)**, should distribute survey



invitations to a representative sample of **both** current consumers and consumers no longer receiving services.

Note: Organizations serving young children, youth or adults with disabilities, or other people who may not be able to complete the survey without assistance should, If practical, ask a family member/custodian or friend to help the person take the survey. Another alternative is to have a neutral staff person (someone who does not directly provide services to the consumer assist the person with the survey.

Note: Organizations providing Domestic Violence Services (DV) are not required to use the Consumer Survey for consumers in the DV programs.

Contractee Survey

Distribute COA's invitation for the **Contractee Survey** to contracted service providers. Contracted service providers may be either individuals or organizations who have been engaged by your organization to provide services directly to your organization's consumers.

How many survey invitations should an organization distribute?

Limit the number of survey invitations to **no more than 100** contractees for each service/program. Contractees are to be randomly selected from across the service/program population of the organization. The organization may choose its own means of random selection, but it must be prepared to explain its sampling method prior to or during the site visit.

Enter the names of all contracted service providers (individuals or organizations) that have been provided with a survey invitation on the **Survey Recipients List** form.

Foster Parent Survey

For Spanish speakers, COA's electronic survey system (either on-line or by telephone) will provide the consumer with the questions in Spanish.

How many survey invitations should an organization distribute?

Organizations with **75 or less** foster families should distribute the survey invitation to **all** foster families.

If an organization has more than 100 foster families, survey invitations should be distributed to **at least 100** families, but **no more than 200** families.

Foster families are to be randomly selected. The sample size should be equally distributed between families who have been with the organization the longest amount of time and families who have been with the organization the shortest amount of time (e.g., **50** families with the organization the longest and **50** families who have most recently joined the organization).

The organization may choose its own means of random selection, but it must be prepared to explain its sampling method prior to or during the site visit.



Personnel Survey and Supervisors and Managers Survey

Only salaried employees and volunteers should be invited to take the **Personnel Survey**.

The **Supervisors and Managers Survey** is intended for use only by the organization's supervisory and management staff.

How many survey invitations should an organization distribute?

Organizations with fewer than **300** personnel should distribute a survey to **all** personnel who occupy an ongoing, permanent full or part-time position.

Organizations with more than 300 personnel should distribute surveys to **at least 300** personnel, but no more than **450** personnel who occupy an ongoing, permanent positions.

Members of the organization's workforce are to be randomly selected. The organization may choose its own means of random selection, but it must be prepared to explain its sampling method prior to or during the site visit.

Youth Survey: For Canadian Organizations Only

Distribute COA's invitation for the **Youth Survey** to mandated youth currently being served.

How many survey invitations should an organization distribute?

Organizations with **200 or less youth** should distribute survey invitations to **all** youth. If youth served by the organization are **greater than 200**, distribute survey invitations to **at least 200** youth, but **no more than 350** youth.

Youth are to be randomly selected from across the service/program population of the organization. The organization may choose its own means of random selection, but it must be prepared to explain its sampling method prior to or during the site visit.

EAP Stakeholder Survey

Distribute COA's invitation for the **EAP Stakeholder Survey** to each of the organizations or individuals that the EAP conducts business with.

Examples include:

- Organizations/entities with which the EAP has purchase-of-service contracts.
- Organizations to which or from which clients are most frequently referred.
- All organizations and governmental entities (local or state/provincial) for which the EAP is accountable to for monitoring purposes.
- Any regulatory or licensing authority that oversees the EAP.
- Unions (local, district, or national).



- Schools or universities with which the EAP has a professional training arrangement.
- Local chapters of EASNA, EAPA or other professional organizations that the EAP is a member of.
- Better Business Bureau.

EAP Affiliate Survey

Distribute COA's invitation for the **EAP Affiliate Survey** to a randomly selected sample of at least **10%** of the EAP's current affiliates. The sample size should not exceed **350** affiliates.

Network Governing Body Survey

Distribute COA's invitation for the **Network Governing Body Survey** to each member of the governing body.

Network Stakeholder Advisory Group Survey

Distribute COA's invitation for the **Network Stakeholder Advisory Group Survey** to each member of the advisory group.

Network Provider / Independent Contractor Survey

Distribute COA's invitation for the **Network Provider / Independent Contractor Survey** to contracted service providers. Contracted service providers may be either individuals or organizations who have been engaged by your organization to provide services directly to your organization's consumers.

How many survey invitations should an organization distribute?

Limit the number of survey invitations to **no more than 100** contractees for each service/program. Contractees are to be randomly selected from across the service/program population of the organization. The organization may choose its own means of random selection, but it must be prepared to explain its sampling method prior to or during the site visit.

Enter the names of all contracted service providers (individuals or organizations) that have been provided with a survey invitation on the **Survey Recipients List** form.

Network Personnel Survey

Only salaried employees and volunteers should be invited to take the **Network Personnel Survey**.

How many survey invitations should an organization distribute?

Organizations with fewer than **300** personnel should distribute a survey to **all** personnel who occupy an ongoing, permanent full or part-time position.

Organizations with more than 300 personnel should distribute surveys to **at least 300** personnel, but no more than **450** personnel who occupy an ongoing, permanent positions.

Members of the organization's workforce are to be randomly selected. The organization may choose its own



means of random selection, but it must be prepared to explain its sampling method prior to or during the site visit.

Network Consumer Survey

Distribute COA's invitation for the **Network Consumer Survey** to current recipients of network services.

For Spanish-speaking consumers COA's electronic survey system (either on-line or by telephone) will provide the consumer with the questions in Spanish.

How many survey invitations should an organization distribute?

Organizations currently serving **200 or less** consumers should distribute survey invitations to **all** consumers. If the number of current consumers is **greater than 200**, distribute survey invitations to **at least 200** consumers, but **no more than 350** consumers.

Consumers are to be randomly selected from across the service/program population of the organization. The organization may choose its own means of random selection, but it must be prepared to explain its sampling method prior to or during the site visit.

Organizations providing **Adoption Services (AS)** or **Inter-Country Adoption Services (ICA)**, should distribute survey invitations to a representative sample of **both** current consumers and consumers no longer receiving services.

Note: Organizations serving young children, youth or adults with disabilities, or other people who may not be able to complete the survey without assistance should, If practical, ask a family member/custodian or friend to help the person take the survey. Another alternative is to have a neutral staff person (someone who does not directly provide services to the consumer assist the person with the survey.

Note: Organizations providing Domestic Violence Services (DV) are not required to use the Consumer Survey for consumers in the DV programs.

Network Community Survey

The organization should complete the following steps:

3. Identify organizations/agencies/entities that fit the descriptions in the table below.
4. Distribute a COA survey invitation for the **Network Community Survey** to identified community stakeholders.
3. Provide the names of all organizations/agencies/entities that were provided the Community Survey to COA with the organization's completed Self-Study using the **Survey Recipients List** form.

✓	Suggested Recipients of the Network Community Survey
	Each organization or governmental entity with which your organization has a purchase-of-service contract .
	The public child welfare (city, county, state, or provincial), mental health (city, county, state, or provincial), substance abuse (city, county, state, or provincial), developmental disabilities/mental retardation (city, county, state, or provincial), juvenile justice, youth justice, criminal justice , or other authorities, as applicable to the services provided by the organization.



	All local, state, or provincial authorities responsible for regulating, licensing, or monitoring the organization.
	The local United Way of America.
	Organizations to which or from which consumers are most frequently referred.
	Colleges or universities with which the organization has a professional training arrangement (undergraduate or graduate).
	The local chapter (city, state, or provincial) of appropriate professional/membership organizations (e.g., National Association of Social Workers or American Psychological Association).
	Advocacy groups in the city, state, province, or community with a direct interest in the services provided by the organization or the well-being of consumers served by the organization.
	All foundations that have provided major support over the last four years.
	Other organizations that can help COA gain comprehensive and accurate information about the organization's role in the community.