

## **DOCUMENTATION FOR THE GENERIC CLEARANCE OF CUSTOMER SATISFACTION SURVEYS**

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**TITLE OF INFORMATION COLLECTION:** Work Incentives Planning and Assistance (WIPA) Survey

**SSA SUB-NUMBER:** F-03

**DESCRIPTION OF ACTIVITY** (*give purpose of activity, provide specific information; i.e., date(s) of survey, number of focus groups, locations, etc.*):

### **BACKGROUND**

In fiscal year (FY) 2007, SSA awarded grants to 104 community-based organizations to provide services under the Work Incentives Planning and Assistance (WIPA) program to beneficiaries with disabilities. Counselors in these local organizations called Community Work Incentives Coordinators (CWIC) provide clients with information about how going to work will affect their monthly cash benefits, medical insurance, and eligibility for other assistance. The CWICs also explain special work incentives designed to assist beneficiaries in their efforts to work. The WIPA services are designed to work in conjunction with other programs (e.g., Ticket to Work) and agencies (e.g., Vocational Rehabilitation) to help beneficiaries with disabilities return to the workforce and become self-sufficient.

### **SURVEY**

#### **Description of Survey**

The WIPA Survey will assess the experiences of beneficiaries who used the CWIC services. We modeled the questionnaire for this survey on the survey instruments approved by OMB (conducted in 2002) for the Benefits Planning, Assistance and Outreach (BPAO) program, the precursor to the WIPA program.

The questionnaire covers a variety of topics that may affect perceptions of the service provided in the WIPA program. Those questions include the following:

- How participants learned about the WIPA program;
- How satisfied participants were with the ease of access to the counselor, including how soon the counselor contacted them initially, how easy it was to reach the counselor by phone, and how long it took the counselor to return their calls;
- How satisfied participants were with the location where they met with the counselor, including the availability of transportation and accessibility for the disabled and privacy;

- How satisfied participants were with the counselor’s behavior, including their courtesy, helpfulness, and the amount of time they spent with the participant;
- How satisfied participants were with the overall service provided by the counselor, as well as with various aspects of the service provided, including:
  - the accuracy of the information provided,
  - the clarity of the counselor’s explanations,
  - the usefulness and helpfulness of the personalized written explanations developed by the counselor,
  - the promptness and helpfulness of the counselor’s actions on their case,
  - the helpfulness of pamphlets, and other general written material provided by the counselor;
- How the services received affected the participant’s decision to work (we included factual questions about work activity before and after receipt of counseling to provide a context for understanding the survey responses);
- What factors, other than the information provided by the counselor, influenced the participant’s decision to work; and
- The education level of the participant.

### **Statistical Information**

#### **Sample Selection**

Mathematica, Inc. maintains the data base of WIPA program participants for SSA. Just over 9,000 beneficiaries have received personalized counseling through the WIPA program about the impact of work on their benefits and/or assistance using work incentives. From this total universe, we plan to select a national random sample of 3,000 participants for the survey.

#### **Methodology**

We plan to conduct the WIPA Survey during January and February 2010. Shortly after sample selection, SSA will send all claimants a written pre-notice on SSA letterhead advising them they have been selected for the survey and encouraging them to participate. We will include both the Paperwork Reduction Act and the Privacy Act explanations in the pre-notice letter.

An SSA-approved contractor will conduct the survey by telephone. The contractor will use computer-assisted interviewing (CATI) software to translate the survey questionnaire so that interviewing and data input of the individual’s responses will occur simultaneously. The CATI software also ensures that only questions pertinent to the individual’s circumstances are asked, allowing for complicated question paths while minimizing response burden.

## **Response Rate**

To maximize the response rate in this survey, SSA will:

- Send a pre-notice of selection for the survey on SSA letterhead signed by the Deputy Commissioner for Quality Performance (A sample of the prenotice letter is included.);
- Conduct the survey by telephone (faster and easier for respondents than mail);
- Schedule appointments to complete the survey at the convenience of the sampled individual;
- Use an experienced contractor who will make at least 15 contacts at different times of the day to reach the sampled individuals;
- Use SSA records to assist the contractor in locating individuals who have moved or changed their telephone numbers; and
- Provide SSA's toll-free 800 number for individuals with questions.

In the BPAO Survey we mentioned earlier in this documentation, we achieved a response rate of 80 percent using a similar methodology with a similar population. We believe we will achieve similar high results in this survey.

## **Sampling Variability**

In SSA's prior survey of claimants who received work counseling through the BPAO program, participants were very satisfied with the service received, giving an overall rating of 89 percent excellent/very good/good (E/VG/G). Considering the similarity of the sample populations and the type of services provided under the BPAO and WIPA programs, we expect to see an equally high level of satisfaction in the WIPA Survey.

The sample size of 3,000 is large enough, assuming an 80 percent response rate, to provide a sampling variability at the 95-percent confidence level of +/-1.2 percent around this key indicator of overall satisfaction. This is an acceptable level of validity for the intended purpose of the survey.

SSA's Office of Quality Performance will perform all sampling and data analysis. Dan Zabronsky, Director, Division of Modeling, Office of Quality Data Management, SSA, will provide statistical support. OMB can reach him at (410) 965-5953.

## **IF FOCUS GROUP MEMBERS WILL RECEIVE A PAYMENT, INDICATE AMOUNT**

We will not compensate participants for this survey.

**USE OF SURVEY RESULTS:**

SSA will use the results of this study to gauge participation satisfaction with the current WIPA program and will share the results with the organizations responsible for program oversight.

**BURDEN HOUR COMPUTATION** (*Number of responses (X) estimated response time (/60) = annual burden hours*):

Number of Responses: 3,000  
Estimated Response Time: 20 minutes  
Annual Burden Hours: 1,000 hours

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