# CUSTOMER FOCUS

## PROCEDURE

**HORIZON**

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Public Health Accreditation Board

**Serving:**

Douglas, Grant, Pope, Stevens, and Traverse Counties

*Updated October 2023*

| Procedure Title: | Customer Focus Procedure | | | |
|---|---|---|---|---|
| Procedure Purpose: | To listen to the voices of our customers, build relationships, determine customers' level of satisfaction, and use customer information to identify and act on opportunities for improvement. | | | |
| Effective Date: | July 1, 2023 | | | |
| Reviewed Dates: | | | | |
| Revision Dates: | October 1, 2023 | | | |

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# Purpose & Background

Public health accreditation has been a driving force behind formal quality improvement efforts in public health departments nationally since 2013 (Journal of Public Health Management and Practice [JPHMP], 2017) There are 360+ health departments that are accredited nationwide and 95% of them say that accreditation has stimulated their quality and performance improvement opportunities (Public Health Accreditation Board [PHAB], 2023).

Horizon Public Health (HPH) defines continuous quality improvement as a systematic, department-wide approach for achieving measurable improvements in efficiency, effectiveness, performance, accountability, and outcomes of the processes or services provided.

We strive to have a culture of quality - having quality improvement that is fully embedded into the way our organization does business, across all levels, divisions, and programs. We encourage our leadership and staff to be fully committed to quality and the results of quality improvement efforts. To have a culture of quality, we aim to communicate our improvement efforts both internally and externally.

In order to effectively work towards a culture of quality, HPH follows the Roadmap to a Culture of Quality Improvement, a change management tool, shown right.

This roadmap integrates process and human considerations into six foundational elements; staff empowerment, teamwork and collaboration, leadership commitment, customer focus, QI infrastructure, and continuous quality improvement.

This Customer Focus Procedure considers each of the foundational elements within the Roadmap to a Culture of Quality Improvement – but will mainly focus on the customer focus piece and how we aim to listen to the voices of our customers, build relationships, determine customers' level of satisfaction, and use customer information to identify and act on opportunities for improvement.

# Customer Focus

Having a customer focus can benefit HPH in many ways, such as (Minnesota Department of Health [MDH], 2015):

- Helps to understand the effectiveness and efficiency of services
- Enhances the ability to understand and meet customer needs
- Fulfills a foundational element within the Roadmap to a Culture of Quality Improvement
- Contributes to multiple areas of public health accreditation

Customers are the partners, recipients, or users of a program, product, or service that is provided by HPH. For this procedure, we have identified three customer groups to be surveyed: **1) Program Participants**, **2) Partners/Stakeholders**, and **3) Internal Team Members**.

**Definitions:**
- **Program Participants:** The individuals, or groups, who receive or use the program's services and/or resources.

- **Partners/Stakeholders:** Members of the public (i.e., community members, groups, agencies, or organizations) who attend regular HPH-led meetings.

- **Internal Team Members:** HPH team members who attend regular internal meetings.

# Methods

The collection and analysis of customer information should be as simple as possible. It is important for HPH to only collect information that is meaningful – and that will be used to drive performance. HPH will deliver customer-focus surveys using the following considerations (Matsumoto & SurveyMonkey, 2023; Solomon & Forbes, 2018):

- Ask for the customer's overall satisfaction rating first
- Limit the survey to a reasonable number of questions (i.e., offer four to six questions)
- Phrase response categories with concrete language
- Provide space for open-ended responses to offer room for customers to express themselves
- Offer a variety of survey platforms to make it more accessible to a wider range of customers
- Consider clear and concise questions with inclusive language
- Allow respondents to skip questions
- Strive for anonymity
- Offer surveys in multiple languages

# Return Rate & Frequency

It is recommended that customers receive a satisfaction survey once per year. However, it is more important that the survey sample size and return rate are statistically significant to achieve meaningful data sets (Survey Monkey, n.d.).

Some HPH program areas already collect customer feedback, but there are opportunities to ensure that this feedback is routinely gathered and used to improve our services.

This procedure will ensure that:

- HPH will hear from 10% of its program participants annually
- At least 25% of HPH-led community meetings are being measured
- At least 25% of HPH internal meetings are being measured

# Performance Management

**Program Participants:**

This procedure gives teams two options to measure participant feedback:

- 1) Use the HPH template and develop additional questions **OR**
- 2) Use a program survey that is already being conducted

As teams review and select the survey option that works best for them, they will be asked to identify the metrics they plan to use for reporting as part of our HPH performance management system. The feedback goal is to hear from at least 10% of HPH program participants.

**Partners/Stakeholders:**

Some HPH teams and individuals facilitate external meetings with community partners/stakeholders to improve community health. A return on time invested (ROTI) survey is a tool that we will use to discover how much value is coming out of our HPH-led community meetings. This tool will be used to drive continuous improvement for these teams. Meeting facilitators will be asked to identify the meetings they facilitate, the frequency of those meetings, and the methods they will use to conduct a ROTI survey. The feedback goal is to survey 25% of HPH-led community meetings.

**Internal Team Members:**

Nearly all HPH team members attend internal program or committee meetings. Internal meetings allow us to share our ideas, make decisions, and build relationships. A return on time invested (ROTI) survey is a tool that we will use to discover how much value is coming out of our internal meetings. This tool will be used to drive continuous improvement across our organization. Meeting facilitators will be asked to identify the meetings they facilitate, the frequency of those meetings, and the methods they will use to conduct a ROTI survey. The feedback goal is to survey 25% of HPH internal meetings.

# HPH Survey Templates

**HPH Feedback Survey - Programs:**

The quality improvement team that developed this Customer Focus Procedure identified four themes of importance as we considered the HPH Feedback Survey template questions; **1) Overall satisfaction**, **2) Health and well-being**, **3) Health equity**, and **4) Open-ended feedback space**. We reviewed multiple customer satisfaction surveys and brainstormed questions as we identified four common template questions:

- Rate your overall experience from 1 to 5:

  Dissatisfied ☆1 ☆2 ☆3 ☆4 ☆5 Satisfied

- Do our services support your health and well-being? Rate from 1 to 5:

  Not at all ☆1 ☆2 ☆3 ☆4 ☆5 Very much

- Do our services address your needs? Rate from 1 to 5:

  Not at all ☆1 ☆2 ☆3 ☆4 ☆5 Very much

- Additional comments or feedback:

  _____

Teams will be asked to identify additional program-specific questions to enhance their work and drive performance using the Feedback Survey Program Plan form on page 8.

The survey will be made available in both paper and electronic formats. Teams will be able to choose a method and frequency to conduct their survey that best aligns with the needs of their participants.

**Please note:** These template questions may not fit for all HPH programs. Some programs already conduct a feedback survey. It is recommended that these programs use or design a separate survey for feedback as appropriate.

# HPH Survey Templates

**Return on Time Invested (ROTI) Survey:**

The quality improvement team that developed this Customer Focus Procedure considered several ways to measure HPH-led meetings. We reviewed multiple ROTI surveys and brainstormed ways to measure the value and impact of our meetings. We identified the following ROTI template for both internal and external uses:

- On a scale of 1 to 5, with 5 being the highest and 1 being the lowest, please rate the meeting facilitated by Horizon Public Health:

    5 Awesome - I got so much from this meeting

    4 Great - Valuable, I gained more than the time I spent

    3 Average - I gained enough to justify the time I spent

    2 Kind of Useful - It was not worth 100% of the time I spent

    1 Useless - No value at all

- What was most valuable?

    _____

- How could we improve the meeting?

    _____

- Additional comments or feedback:

    _____

The ROTI survey will be made available in both paper and electronic formats. HPH meeting facilitators will be able to conduct the survey in the method and frequency of their choosing. They will be asked to fill out the External or Internal Meeting Feedback Plan(s), as appropriate, on pages 9 and 10.

# References

American Academy of Family Physicians & White, B. (1999). Measuring patient satisfaction: How to do it and why to bother. AAFP. Retrieved May 16, 2023, from https://www.aafp.org/pubs/fpm/issues/1999/0100/p40.html

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Solomon, M., & Forbes. (2018, May 25). 13 best practices for designing customer satisfaction surveys (CSAT). Forbes. Retrieved May 16, 2023, from https://www.forbes.com/sites/micahsolomon/2018/05/25/customer-experience-surveys-13-tested-scientific-best-practices-i-bet-youre-doing-5-or-more-wrong/?sh=6e94fcb318fa

Survey Monkey. (n.d.). How many survey responses do I need to be statistically valid? SurveyMonkey. https://www.surveymonkey.com/curiosity/how-many-people-do-i-need-to-take-my-survey/

# Feedback Survey Program Plan

Program Area: _____

Supervisor(s): _____

Project Lead(s): _____

Today's Date: _____

Survey Start Date: _____

**Will you be using the HPH template for your survey or a separate survey\* to measure feedback?**

*\*The template questions may not fit for all HPH programs. Some programs already conduct feedback surveys. Please use/design a separate survey for feedback as appropriate.*

☐ HPH Template       ☐ Separate Survey

**List:** name of survey, frequency given, metrics you will use for reporting, total participants served in your program, percent of participants being surveyed, and any other important information about your program's survey. <u>Be as detailed as possible.</u>

[ ]

How many participants are served in your program area? [ ]

What is 10% of that number? [ ] (This is your feedback goal)

## Additional Questions:

Add one or two questions to enhance the set of feedback questions already on the HPH template that are specific to your program area. These questions should help facilitate the performance management system and continuous quality improvement.

[ ]

## Methods:

What method(s) will you use to conduct the survey? What tools will you need? <u>Be as detailed as possible.</u>

**Examples:** paper survey with return envelope, paper survey with no return envelope, QR code and flyers, QR code and postcards, link with email template, link with text template, program script, and/or other.

[ ]

## Frequency:

How often will your program offer the survey to meet your feedback goal. List staff expectations here.

[ ]

# External Meeting Feedback Plan

Program Area(s): [                    ]

Supervisor(s): [                    ]

Project Lead(s): [                    ]

Today's Date: [                    ]

## What meeting(s) do you facilitate or host externally with partners/stakeholders?

**List here:** name of the meeting, frequency of the meeting, purpose of the meeting, average number of attendees, in-person versus zoom, are you currently measuring something related to this meeting, do you already conduct a feedback survey, do you measure return on time invested, etc. If we are not the lead agency, who is? Be as detailed as possible.

Meeting: [                    ]

Meeting: [                    ]

Meeting: [                    ]

Meeting: [                    ]

Meeting: [                    ]

*If you host/facilitate more than five meetings, list the meetings that you feel are most important and should be measured with a Return on Time Invested (ROTI) survey. If you can group them in a way that makes sense, that works too. Goal is to measure 25% of HPH meetings annually.

## Methods:

What method(s) will you use to conduct a Return on Time Invested (ROTI) survey? What tools will you need? <u>Be as detailed as possible</u>. **Examples:** paper survey with return envelope, paper survey with no return envelope, QR code and flyers, QR code and postcards, link with email template, link with text template, meeting script, and/or other.

[                    ]

## Frequency:

How often will you offer a Return on Time Invested (ROTI) survey to meet your feedback goal of 25% of the meetings you host or facilitate per year. Input dates of meetings to be surveyed if you can. List all expectations here.

[                    ]

# Internal Meeting Feedback Plan

Program Area(s): [                                      ]
Supervisor(s): [                                      ]
Project Lead(s): [                                      ]
Today's Date: [                                      ]

What meeting(s) do you facilitate internally at Horizon Public Health?

*Examples: Wellness & Safety Committee, Accreditation Domain Meetings, Benefits Committee, etc.*

**List here:** name of the meeting, frequency of the meeting, purpose of the meeting, average number of attendees, in-person versus zoom, are you currently measuring something related to this meeting, etc. Be as detailed as possible.

Meeting:
[                                      ]

Meeting:
[                                      ]

Meeting:
[                                      ]

\* Goal is to measure 25% of HPH meetings annually.

## Methods:

What method(s) will you use to conduct a Return on Time Invested (ROTI) survey? What tools will you need? <u>Be as detailed as possible</u>. **Examples:** paper survey, QR code, link with email template, and/or other.

[                                      ]

## Frequency:

How often will you offer a Return on Time Invested (ROTI) survey to meet your feedback goal of 25% of the meetings you host or facilitate per year. Input dates of meetings to be surveyed if you can. List all expectations here.

[                                      ]