

Executive Council of Physical Therapy and Occupational Therapy Examiners

Report on Customer Service

May 2014 – May 2016

1. Overview

The Executive Council of Physical Therapy and Occupational Therapy Examiners (ECPTOTE) maintains an organizational commitment to providing excellent customer service for all of its client groups. However, accurately measuring the level of service is a challenge due to the “newness” of the concept of measuring satisfaction and inexperience of the staff in creating sampling instruments and analyzing the gathered data. Until FY 2002, our self-evaluated level of performance was all anecdotal and based on individual, client generated opinions. If enough people complained about a process, or the mannerisms of a clerk, to a supervisor or the Executive Director, the process was eventually changed if possible and the clerk was counseled or let go. Otherwise, there was no formal method of measuring just how well we were doing our jobs as viewed by our primary customers – the licensees, or methodology of correctly responding to the faults they pointed out.

2. External Customer Inventory

The Executive Council primarily provides services to the licensees of its two boards’ - Physical Therapists and Physical Therapist Assistants, Occupational Therapists and Occupational Therapy Assistants, through licensure to practice. Other related customers are the owners and employees of the Physical Therapy and Occupational Therapy facilities that are registered by the agency. This provision of services supports the agency’s Strategy 1. ECPTOTE also provides services to therapists who are not licensed by the agency, potential licensees, and persons enrolled in a therapist education program. This is usually in the form of providing information. Other customers include citizens who file a complaint against one of the agency’s licensees. Investigation and disciplinary action against guilty licensees support Strategy 2.

3. General Description and History of Information Gathering Methods

In December 2001, ECPTOTE first contracted with the Center for Social Work Research at the University of Texas (UT) to manage its customer survey. The survey began in January, 2002 with results provided to the agency three times a year. ECPTOTE signed an initial contract for CY 2002, with expectations of continuing the survey process indefinitely. A paper and pencil survey was enclosed with about 70 - 100 license renewals every month, and the licensee had the option to either fill out the survey on line on the UT website or return the completed survey with the renewal. The total cost to administer, interpret, and report on the survey results gradually dropped from the initial cost of \$1550/year to \$750/year, or about \$.30/person surveyed.

During the FY2003 budget crisis, the ECPTOTE had its budget significantly reduced in February 2003. One of the many contracts allowed to lapse due to lack of funds was the contract with the Center for Social Work Research. The contract was not renewed until March 2004, when the agency gained discretionary income through its sales of mailing lists. That contract, which continues to date, included the same conditions and cost, but there was almost a one year gap in collecting and compiling survey data. While licensees occasionally filled out the survey on the

agency's web site, the data was automatically sent to UT, sight unseen by the agency. Data from those completed surveys were included in the first resumed report. There have been no breaks since, although the time between reports has now extended to once a biennium, usually in the March/April timeframe.

Due to new processes set up to enhance the use of the online renewal system, the data collection method required modification. The agency now mails out notification postcards instead of a renewal packet (with survey enclosed), thereby precluding the use of mail in distributing surveys. However, the 95% of the licensee population who use the online renewal program every two years on the agency web site are now exposed to the survey, which is included as part of the online renewal process. Filling out the survey, as always, is voluntary, but the response rate has significantly improved since its inclusion in the renewal process. A much smaller group of respondents accessed the survey directly from a different area of the agency's website.

The agency is now provided results on request, usually in late April before the strategic plan is due. When it was discovered that written comments were also collected all year and then provided at the same time (In some cases, they were almost a year old), the agency negotiated a modification to the contract, whereby written comments were received monthly. The contract has been further modified so that comments are immediately forwarded to the agency upon submission, allowing an almost immediate response to a comment.

ECPTOTE has made frequent changes to its web site, usually driven by outside requirements or opportunities to enhance the site. A negative consequence of one of those changes is that sometime in 2011, the customer survey was disconnected, and remained so for a lengthy period of time. This problem was not discovered and corrected until April 2012 (when the report was received) – there were only 327 responses. This is in contrast to the 2,425 in the previous biennium, and 3,423 in the current biennium.

4. Methodology and Analysis of the Survey of Organizational Excellence Group Administered Survey (as described by the Center for Social Work Research):

Overview

Customer service surveys were administered starting in the spring of 2002 by the Survey of Organizational Excellence Group (SOE) at The University of Texas at Austin School of Social Work for the Executive Council on Physical and Occupational Therapy Examiners (ECPTOTE). The survey project intent was to measure customer service perceptions from the recipients of agency services. The data also serve to address the Customer Service Standards Act (1999, SB 1563). This report contains both an overview of the findings and individual item results and analysis. This is followed by a review of the methodology used in the survey administration.

Detailed Survey Methodology

Design

The design process incorporated three objectives. First, the survey created substantive customer service survey data for strategic planning and organizational initiatives. Second, the design accurately portrayed and represented (through use of standard and tested surveying techniques) the perceptions of customers. Lastly, implementing the survey established an open forum in which both the citizens of Texas and the direct recipients of services could evaluate interactions, recognize outstanding service, and/or offer insights into how service was delivered and where service needed to improve.

To accomplish these objectives survey areas or dimensions were created. The dimensions categorized various customer perceptions into distinct units. Categorical distinctiveness allows for an organization to more thoroughly assess whether or not they are meeting or exceeding customer expectations in a given area of operation. Both the quantitative and qualitative data provided through the survey process reaffirms areas of strength and draws attention to potential areas of concern.

Seven survey areas (facilities, staff, communications, Internet site, complaint-handling processes, service timeliness, and printed information) were specifically listed in the Legislative Budget Board's Strategic Planning Instructions derived from the Customer Service Standards Act. However, the planning instructions did allow for agencies to not assess on a particular area if it did not apply to the service delivery function of the agency. For each dimension, the survey participants were asked to respond to various items concerning perceptions of customer service.

The customer perceptions were measured on a Likert-type scale with 5 possible responses (strongly disagree, disagree, neutral, agree, and strongly agree). Point values ranging from 5 for strongly agree to 1 for strongly disagree were assigned upon processing the data. If the respondent had no knowledge or the item did not apply to their situation, they were asked to leave the item blank. The higher the response the more strongly respondents agreed with the statement. All items were positively worded so that higher values are representative of higher levels of agreement or may be viewed as more positive perceptions of customer service.

The survey also included an item asking for the frequency of contact with the agency and an open-ended item. Customers were also asked to identify the customer category that best described themselves. The open-ended item, found at the end of the survey, asked respondents to offer any additional comments and/or to identify outstanding service from employees or divisions. The open-ended section was designed to allow for sources of input (compliments, criticisms or suggestions) not directly addressed in the printed survey items. Moreover, asking customers to recognize individuals who provided outstanding service assists in identifying employees who excel in providing exemplary service to customers. To allow for a rapid response to potential concerns, survey participants were able to mark a box on the online version that immediately forwarded their comments to the agency.

Survey Instrument Type

The survey is an online instrument. Utilizing both HyperText Markup Language (html coding) and Common Gateway Interface (cgi scripting), the survey was first made available via the internet at the following Internet address:

<http://www.orgexcel.net/survey/index.php?&sc=53301>

The equipment used to serve the web site and the corresponding database of responses (a Unix based system) handles thousands of simultaneous requests and performs routine data backups both incrementally and daily. Respondents receiving the OMR version of the survey could take the survey online by going to the web site address and by entering their control number (printed on the survey instrument). In the event a control number entered online was in conflict (the two numbers were the same) with a control number received from a hardcopy survey, the online survey data would be removed as a valid response. For this dataset, there were no conflicting control numbers.

The online survey was incorporated in the agency online renewal system and a link on the home page. The design was concise for various reasons. First, the survey served as a general customer service diagnostic that assessed customer perceptions in broad topical areas. While many inferences can be made from the survey data, low scoring areas may require additional assessment to determine underlying causes. Conversely, further examination of high scoring dimensions may produce examples of an organization's "best practices" that can be shared among other parts of the agency. Also, the general nature of the survey enables the agency to use the instrument in different settings; and therefore, the survey results allow for comparison of dimensions across the organization. Second, instruments such as these (voluntary questionnaires of customers) are succinct so that the respondent can complete the survey in only a few minutes. Typically, long questionnaires (due to the specificity of items and considerable length of time to complete the survey) discourage participation. Experience shows that response rates for concise surveys achieve an acceptable returned percentage of greater than 10%. Third, providing survey participants the opportunity to comment in an open-ended section shapes the preparation of follow-up surveys. Customers' suggestions are often used to modify the content of future customer service survey items.

Analysis

Survey responses were compiled and analyzed. For the demographic items, frequency counts and percentage of respondents are tabulated. Furthermore, for each category code such as industry and program, an average score for this item: "Overall, I am satisfied with the service I received." was calculated. This item is a general statement about the agency's customer service performance. Providing these scores for each category permits direct comparisons across the various response options.

For the scaled items (the non-demographic items listed at the bottom of the survey), average scores, number of respondents, standard deviations, and frequency counts of response choices were calculated. The statistical calculation of standard deviation measures variability of responses. The smaller the standard deviation, the closer together the distribution of the respondents' scores are. The greater the standard deviation, the more scores are spread among the responses. Once item averages were calculated, dimensional averages were computed by taking an average of all the mean item responses, which comprised the different dimensions. Open-ended responses were returned in their entirety directly to the agency.

Additional analysis of the survey instrument was conducted. Confidence intervals (set at 95%, the most commonly reported level) were calculated for all scaled items. The level creates an interval (a range around the average item score). This means that you can be 95% confident that the interval contained the average scores for your selected customer sample. Reliability (a consistency measure of the survey instrument) was calculated and had an internal consistency coefficient exceeding the generally accepted value. Sample sizes and anticipated rates of response rate allowed for a (plus/minus) 5 error at the 95% confidence level. Subject research,

face validity and factor analysis were used to assure general validity, or in other terms, the survey measured what it intended to measure.

5. Summary of Results:

All results were provided to the agency through a link on the UT website, which allowed the agency to custom build a report. Results are provided exclusively from data collected through the ongoing online assessment process. For the sample surveyed, ECPTOTE has an acceptable response rate. The items were scored on a five-point scale with 5 being “strongly agree” and 1 being “strongly disagree”. Overall, the agency had a very positive overall satisfaction rating in the sample time period of May 2014 – May 2016 with 81% of the 3,423 respondents stating that overall; they were satisfied with their experience with the agency. Of the remaining respondents, 10% were neutral on this item, 4% disagreed, and 4% entered “strongly disagree”. This is a much higher overall score than the score in the previous biennium.

The highest scoring items regarded the interaction with staff and information received from the agency. The usefulness and ease of use of the agency web site were the lowest. This was due to the roll out of a reworked renewal system within the web site that took much longer to work the bugs out than was originally expected. Consequently many licensees had difficulties renewing their license, resulting in a lot of heartburn. Heartburn = low scores in that area of evaluation. Despite this, most individual scores of questions were higher than those of the previous biennium.

Any survey question with an average (mean) score above the neutral midpoint of “3.0” suggests that respondents perceive the issue more positively than negatively. Scores of “4.0” or higher indicate areas of substantial strength for the organization. Conversely, scores below “3.0” are viewed more negatively by respondents and should be a significant source of concern for the organization and receive immediate attention.

Following is a breakout of the population who responded to the survey:

Please indicate the category which best describes you:

Number of Respondents: 3393

Item Response	Count	Pct.
Physical Therapist	1342	39.55%
Physical Therapist Assistant	732	21.57%
Occupational Therapist	797	23.49%
Occupational Therapy Assistant	422	12.44%
Customer/Patient	5	0.15%
Licensee/Applicant	73	2.15%
Other (please specify)	22	0.65%

What was the purpose of your contact with ECPTOTE?

Number of Respondents: 3423

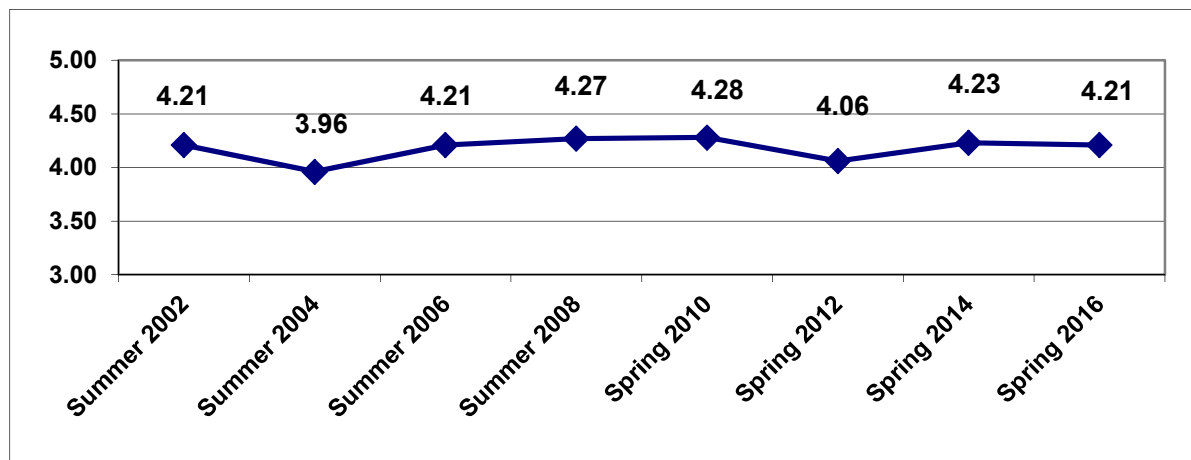
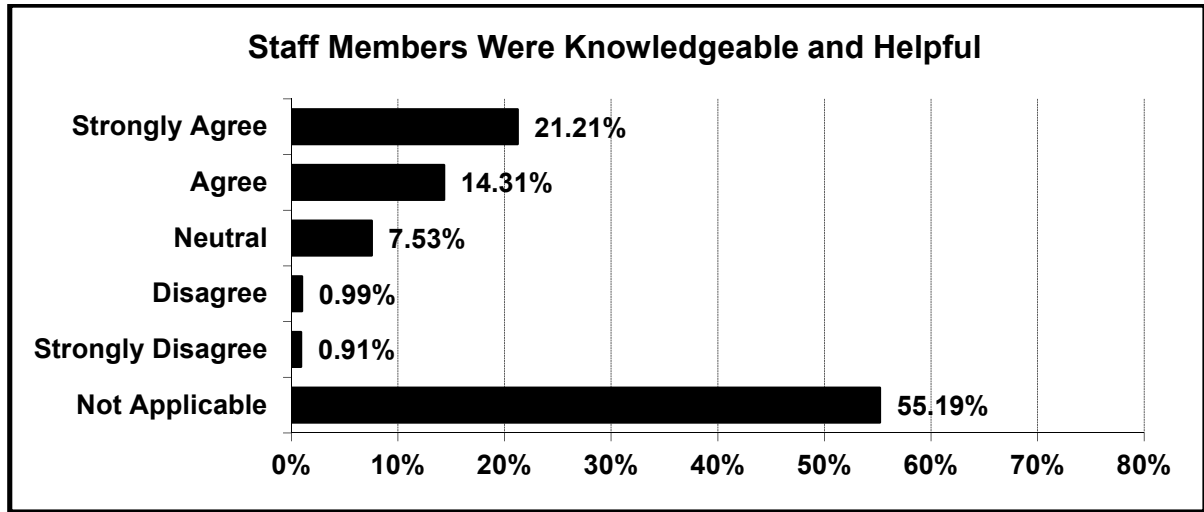
Item Response	Count	Pct.
Application Status	356	10.40%
License renewal information	2814	82.21%
Open Records Request	16	0.47%
File or respond to complaint against licensee	12	0.35%
Obtain forms/publications	93	2.72%
Name/address change	137	4.00%
Problem with ECPTOTE	18	0.53%
Inquiry about obtaining a license	247	7.22%
Interpretation of OT or PT Rules and/or Acts	260	7.60%

Below are the most recent mean scores of questions from this survey compared to the results reported in the previous Report on Customer Service:

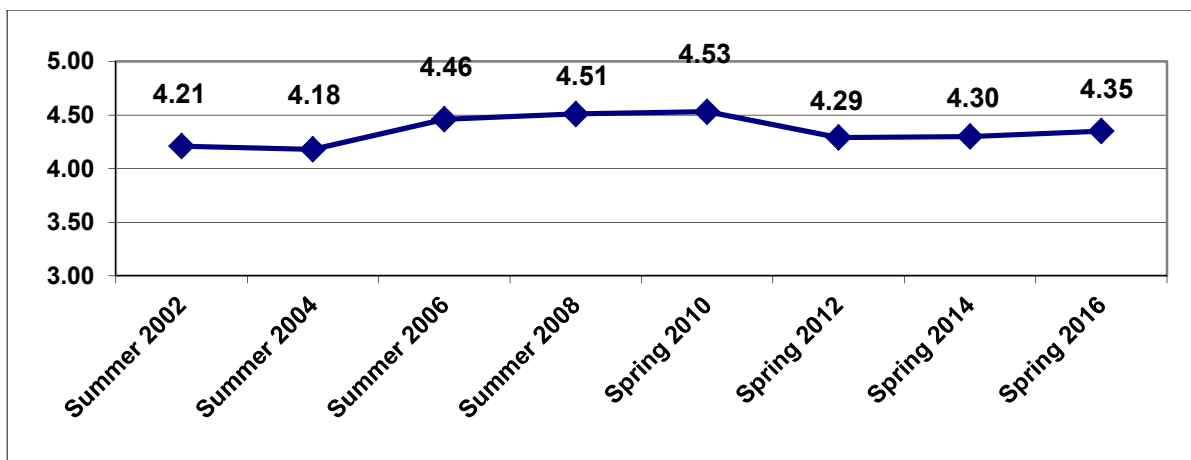
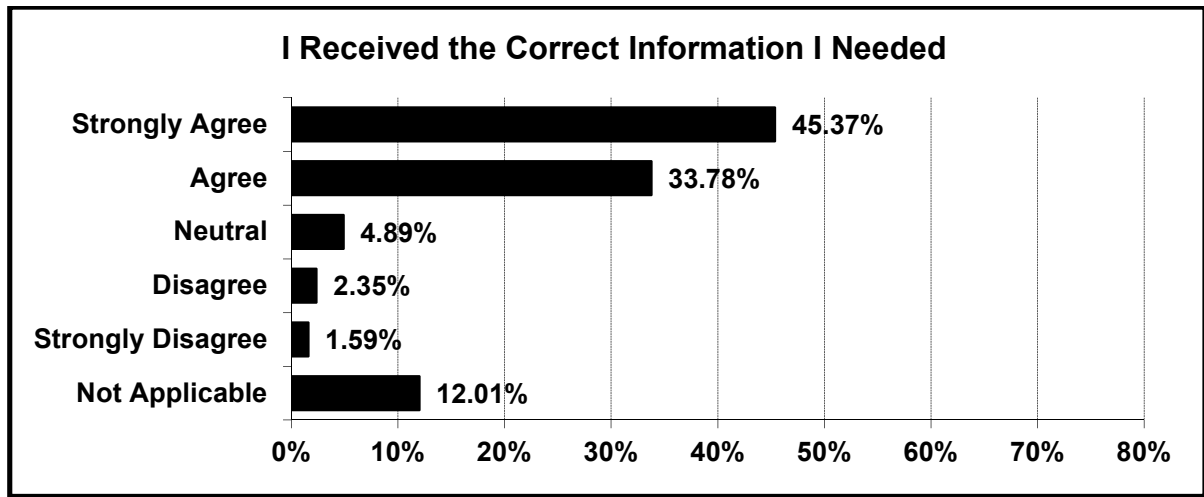
Item Number	Item Descriptor	Spring 2014	Spring 2016
1.	Staff members were knowledgeable and helpful.	4.24	4.21
2.	I received the correct information I needed.	4.29	4.35
3.	I received the correct materials I needed.	4.27	4.34
4.	The web site was easy to use and well organized.	3.69	4.03
5.	The web site contained clear and accurate information on events, contact services, and information.	3.94	4.15
6.	If I complained, I believe it would be addressed in a reasonable manner.	3.94	4.04
7.	My telephone call, letter or e-mail inquiry was answered in a reasonable amount of time.	4.14	4.01
8.	Printed brochures or written material provided thorough and accurate information.	4.11	4.21
9.	If I visited the facility, it was clean and orderly.	4.12	4.09
10.	Overall, I am satisfied with my experience.	3.91	4.13
	Total Number of Respondents	1,054	3393

The frequency distribution for each of the 10 questions asked on the latest survey, with associated over-time comparison graph:

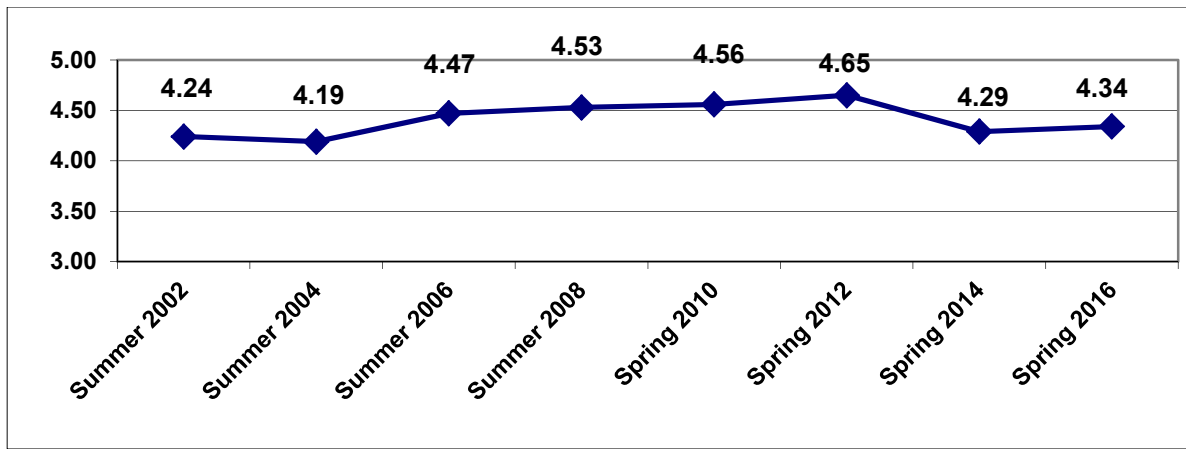
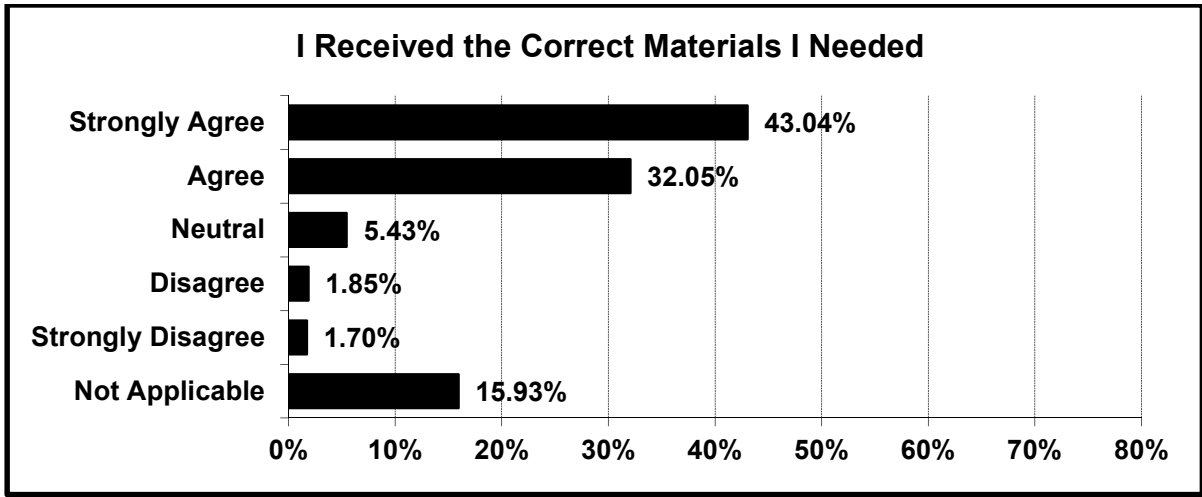
1. Staff members were knowledgeable and helpful.



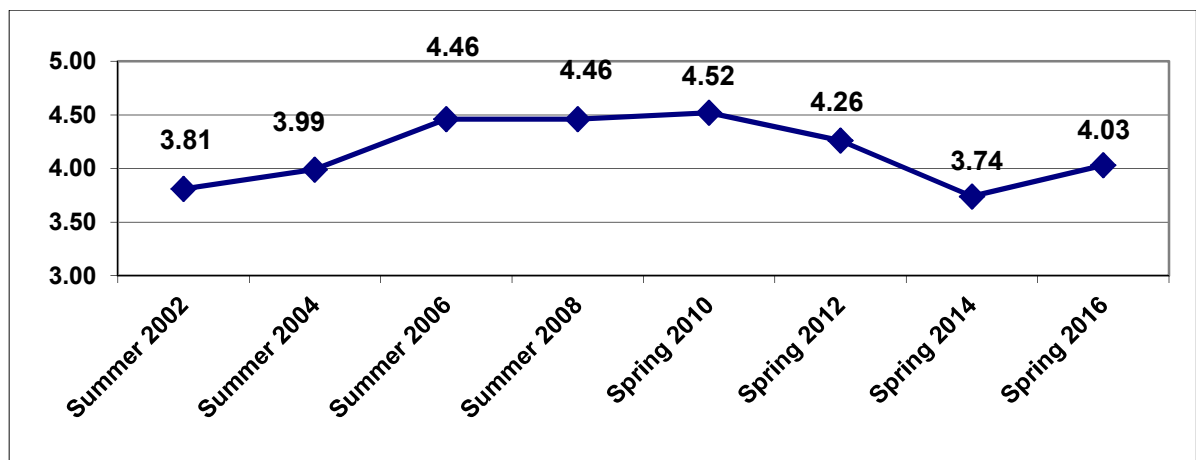
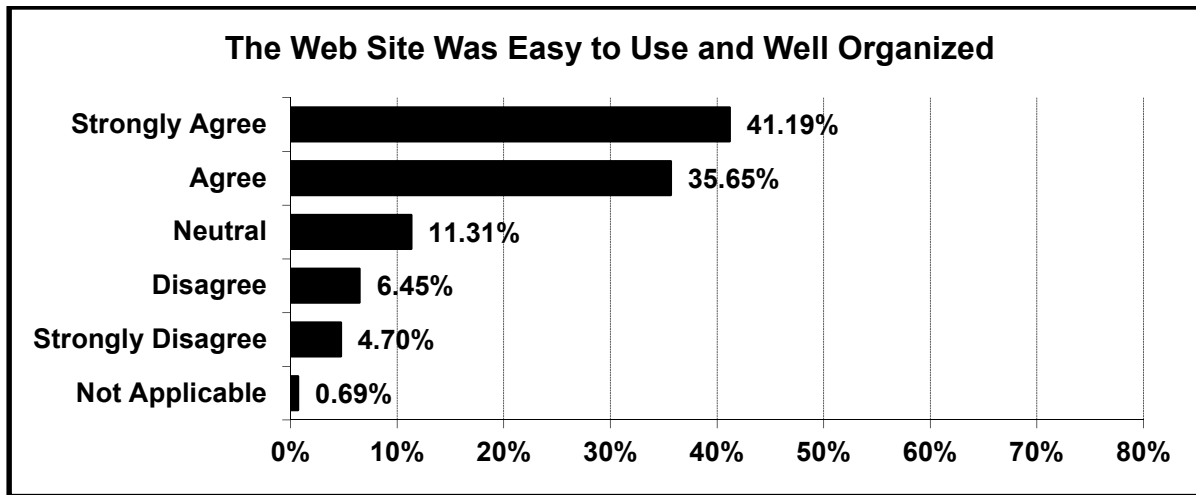
2. I received the correct information I needed.



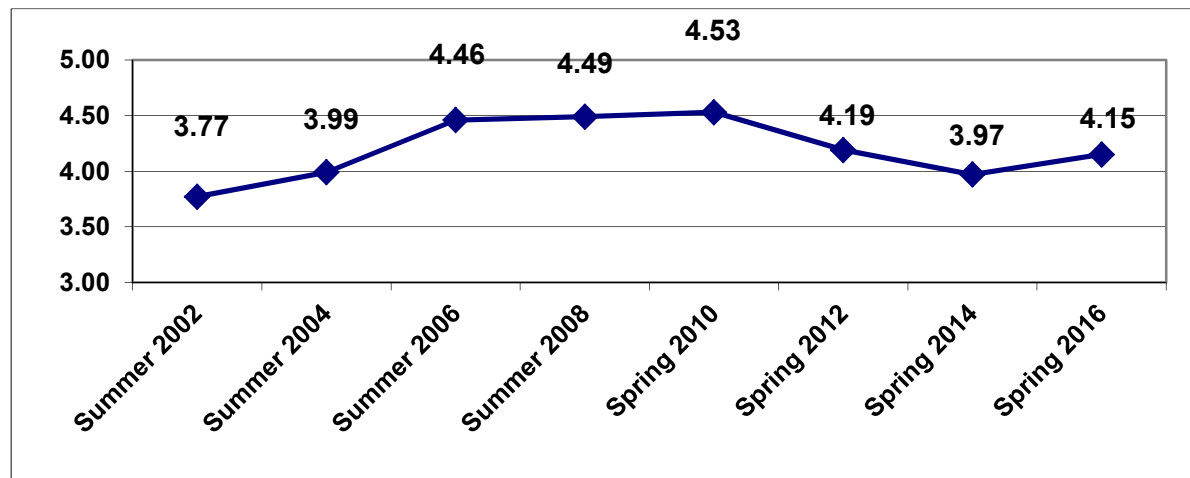
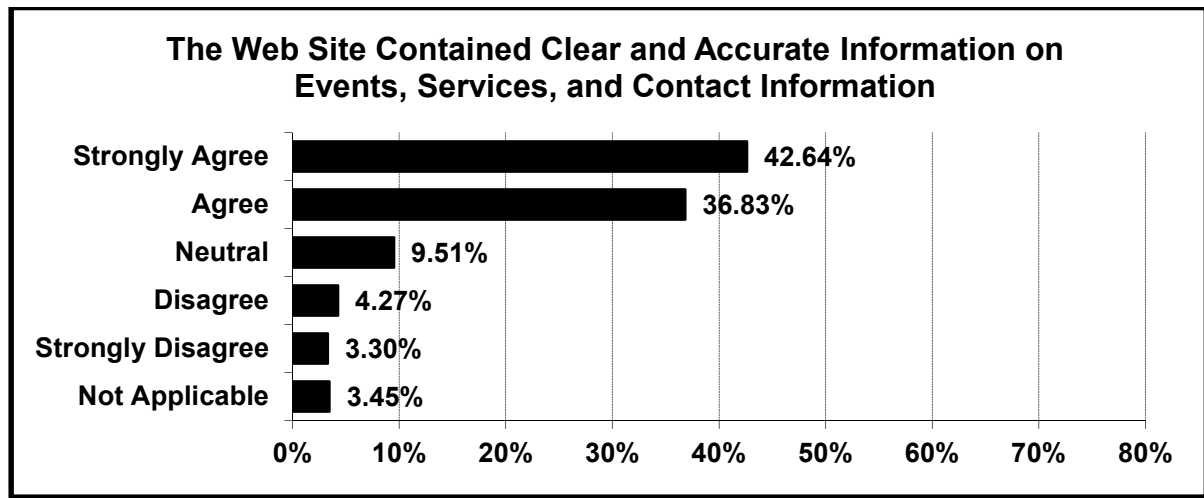
3. I received the correct materials I needed.



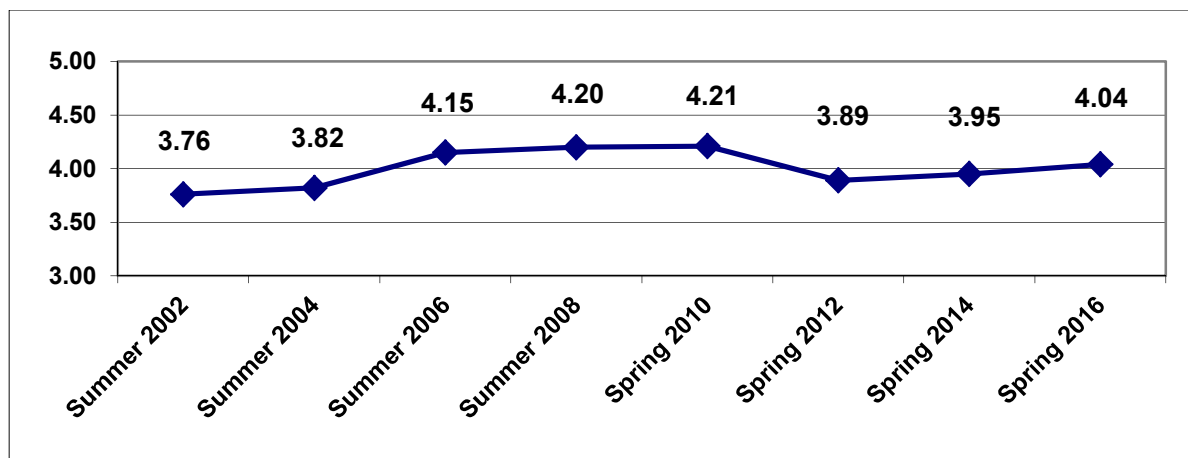
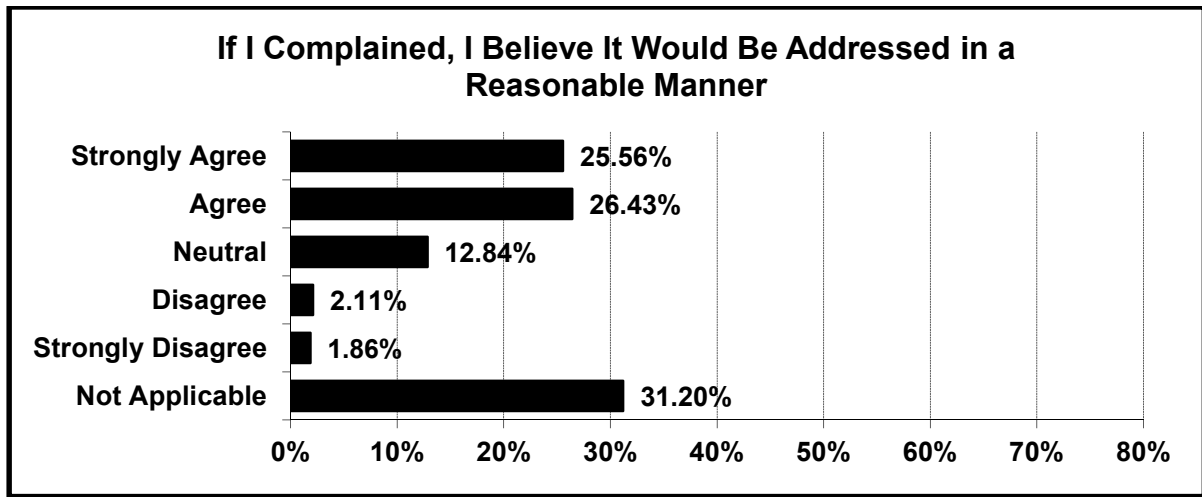
4. The web site was easy to use and well organized.



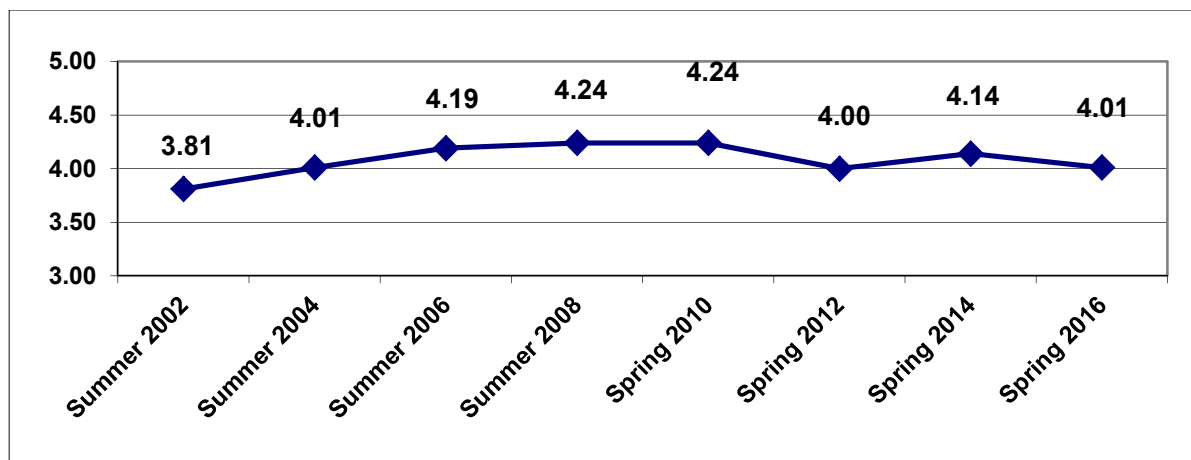
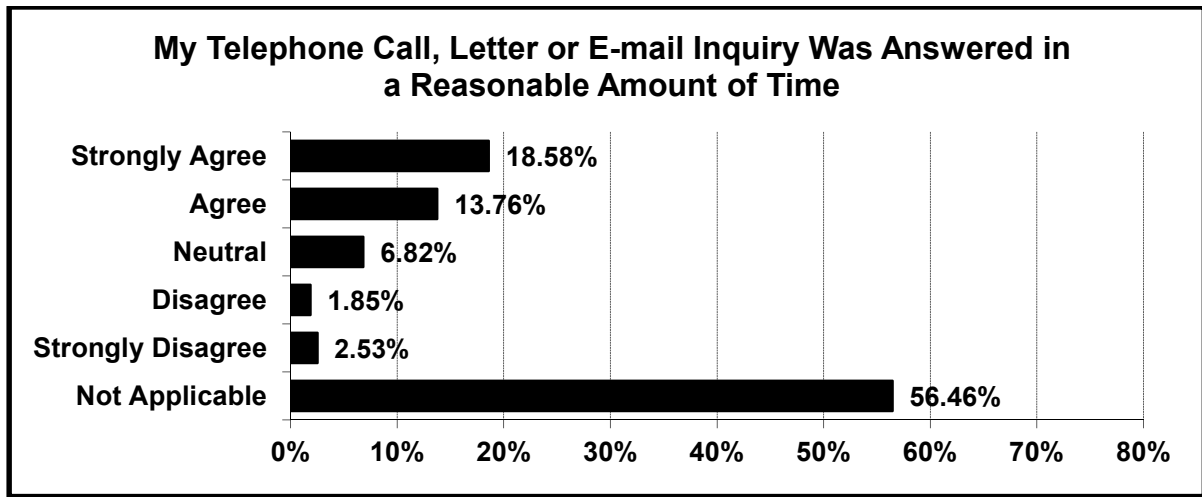
5. The web site contained clear and accurate information on events, contact services, and information.



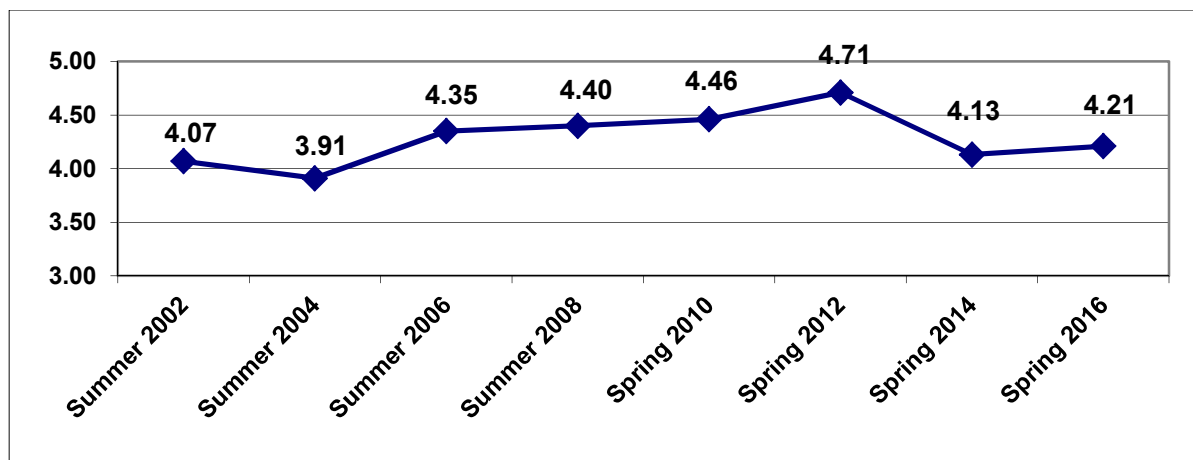
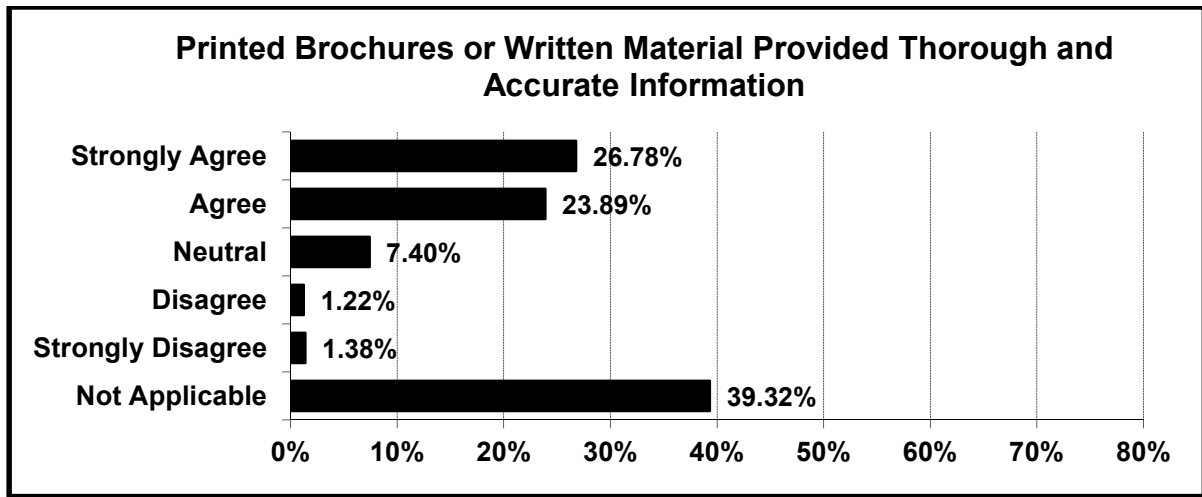
6. If I complained, I believe it would be addressed in a reasonable manner.



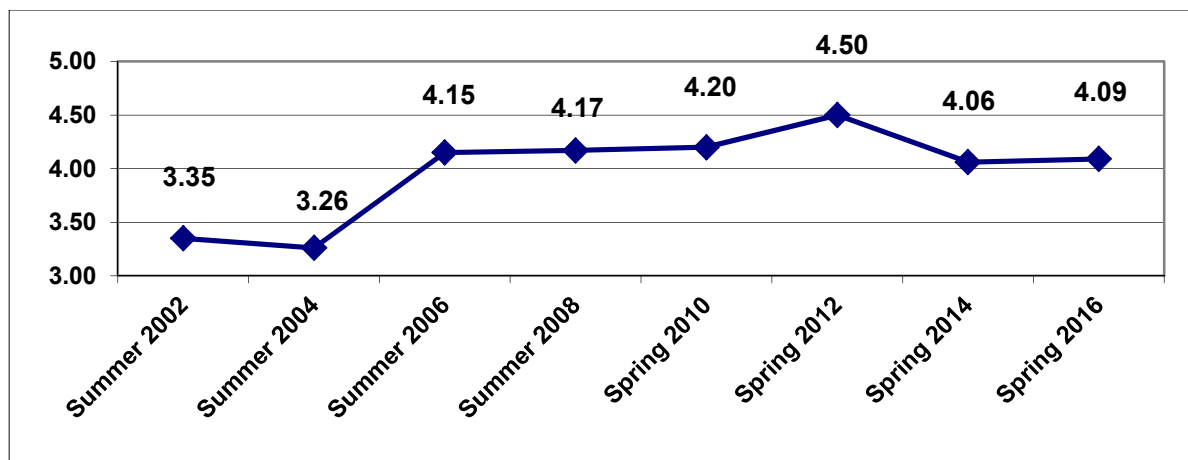
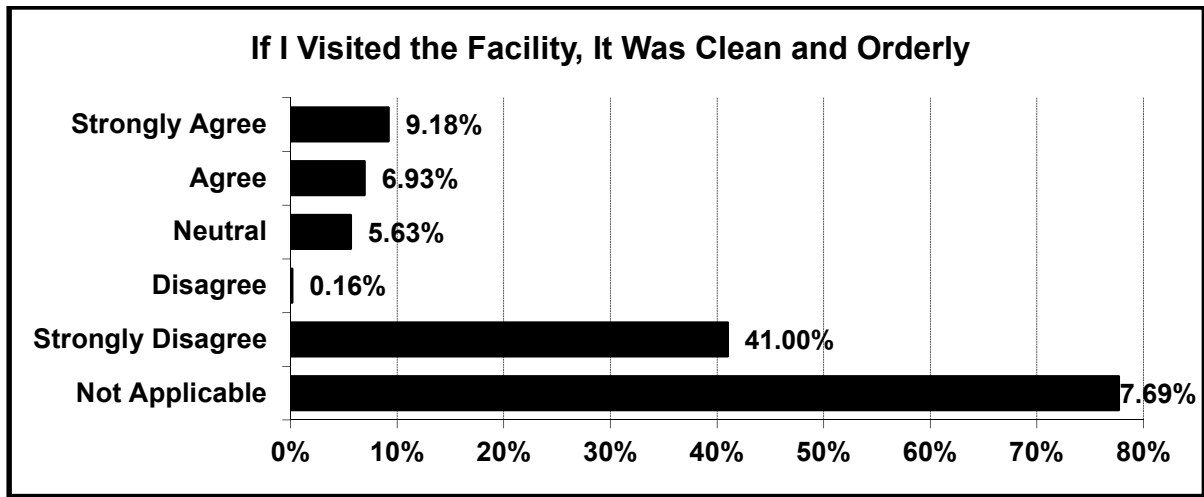
7. My telephone call, letter or e-mail inquiry was answered in a reasonable amount of time.



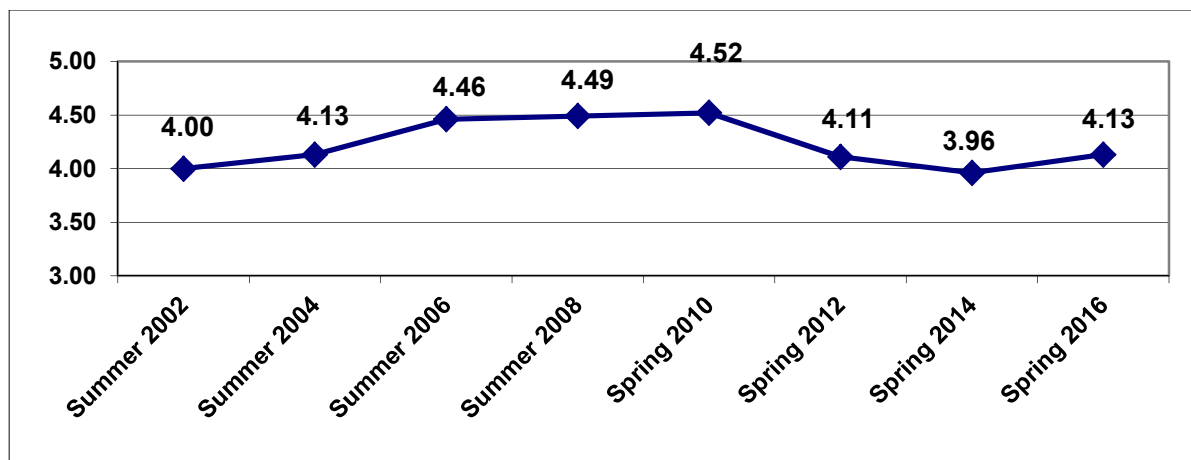
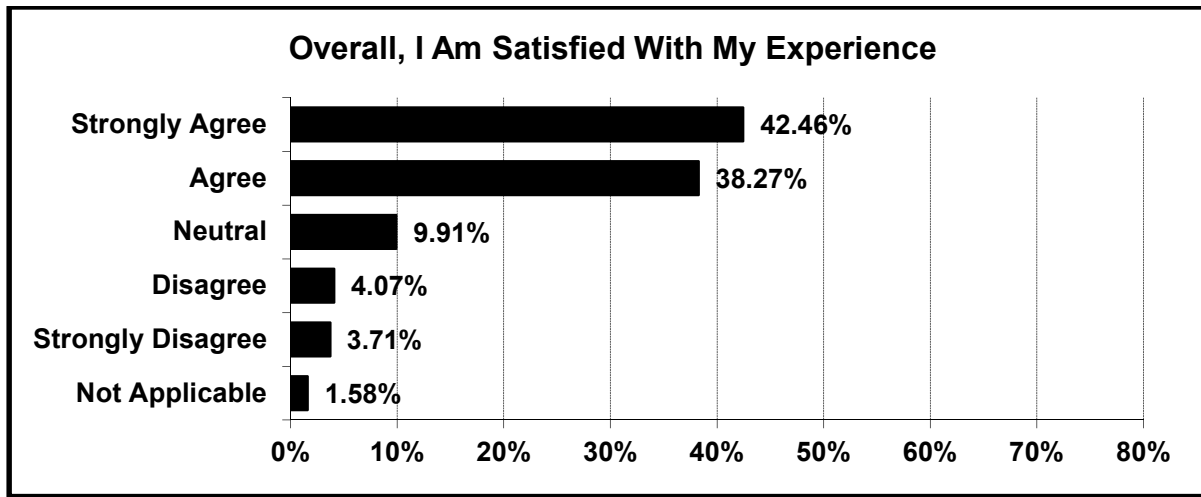
8. Printed brochures or written material provided thorough and accurate information.



9. If I visited the facility, it was clean and orderly.



10. Overall, I am satisfied with my experience.



Customer Assessment Strategy

Continuous assessment of the opinions of customers is used by most industries and is a growing concern for state government. The assessment does not have to be costly or time consuming. The following recommendations were made to ECPTOTE from UT to effectively conduct ongoing customer service assessment. The first two were implemented.

- Maintain a prominently displayed link from the agency's internet home page to the online customer service assessment. The online assessment is easily maintained, modifiable, and cost effective. This type of assessment is available at all times.
- Build the database capability to store email addresses so that customers can be invited to assess the agency via the internet. This type of assessment can be done twice a year.
- Once a year conduct a random sample or 100% poll of the customer base.

6. Agency Corrective Actions

Results can vary depending on which questions are asked and how they are asked. The UT survey, which was a refinement of the original agency survey, has provided far better information to the agency concerning the major focus areas of customer service than its internally developed survey. We have a good feel for our weaknesses and strengths, but right now are using the anecdotal information obtained from survey comments to make needed changes to agency operations.

In the past, we had several major issues on which we could focus our efforts. These issues were obvious, and usually had workable solutions. We have made those corrections through the years, and we now find ourselves with only issues and solutions that would require a major effort and significant funding to implement, e.g., creating a true interactive web site. Until we find those resources, we are forced to take some “small ball” steps.

Our day to day efforts in improving customer service are focused on the written feedback given by those taking the survey. A major problem, gradually solved, was to arrange to receive written feedback first monthly, and then as it arrives at UT. When we received the written copy of the customer survey each May, we also received a years’ worth of comments. It proved very embarrassing having to respond to someone’s “please contact me” request almost a year later! This led to the next initiative.

When we receive the written comments from those leaving feedback and who expressed a concern, the two board coordinators contacted everyone who left a phone number or email address or even just a name. There have been a large number of these over the past few years, and the coordinators have responded to every one of them. In this way, we were able to solve problems or answer questions in a one-on-one manner. The only problem to this is when someone makes a comment to which we would normally respond, but they fail to identify themselves! Following is the rollup of comments received during the past year:

Compliment	Complaint	Suggestion	Request
71	127	138	22

The lowest scored item was for the first time, not related to customer service, but the two questions directly addressing the agency web site. As a counterpoint, direct customer service items all had significant upticks. Two years ago, the items related to customer service were falling; prompting us to take steps to correct this potential problem. It was addressed in staff meetings, through prompt correction to those employees perceived not acting correctly in outside communications, and making courtesy an item on employee evaluations. Improvements over time are noted in this area based on the survey feedback, but even one annoyed customer is one too many.

The web site issue is probably caused by the “aging” of the web site. It is a very plain looking/utilitarian site and requires some improvements to the basic services it provided. During the winter of CY2016/7, the web site is being rewritten to incorporate some necessary security changes, additional services to licensees, and most importantly, the agency licensing database..

Additionally, the overall basic design will also change. Once these improvements are made, we expect that the general decline in the approval ratings for the two web site items will be reversed.

7. Future Planned Assessments

As long as funds are available, the Executive Council plans to continue to contract with the Center for Social Work Research to survey the attitudes and opinions of our customers who renew their license on line, and maintain a link on its web home page to the survey for access by everyone else.

8. Customer Service Performance Measures

Measure (calculated as of summer of even numbered years)						
Outcome	FY2012	FY2014	FY2016	FY2017 (est.)	FY2018 (est.)	FY2019 (est.)
% of Surveyed Customer Respondents Expressing Overall Satisfaction w/ Services Received	74%	78%	81%	83%	84%	84%
% of Surveyed Customer Respondents Identifying Ways to Improve Service Delivery	2%	2%	2%	2%	2%	2%
Output						
# of Customers Surveyed	327	1,054	3,424	1,600	1,650	1,700
# of Customers Served	35,527	40,075	44,107	46,000	48,000	50,000
Efficiency						
Cost per Customer Surveyed	\$0.30	\$0.29	\$0.27	\$0.26	\$0.25	\$0.24
Explanatory						
# of Customers Identified	35,527	40,075	44,107	46,000	48,000	50,000
# of Customer Groups Inventoried	3	3	3	3	3	3