

Responsibilities of Sponsors, Vendors, and Consultants

Activity	Role of sponsor	Role of vendor(s)	Role of consultant
Planning and project design	<ul style="list-style-type: none"> • Designate a project director. • Define the project goals. • Issue the request for proposal (RFP) and select a vendor. • Develop reporting strategy. • Plan evaluation of project. • Appoint advisory committee (optional). 		<ul style="list-style-type: none"> • Provide guidance on defining project audiences, reporting audiences, and how the CAHPS project can fit into your overall organization goals. • You could choose to hire multiple consultants for different aspects of the project or you may hire one consultant who has expertise in all aspects of your project. • Depending on the scope of your project, the consultant may participate only in the planning phase or may participate over the entire project period.
Project management	<ul style="list-style-type: none"> • Designate a project manager who will manage the day-to-day operations and will be the key contact for all the other team members, vendors, and health plans. 	<ul style="list-style-type: none"> • Designate a primary contact person to work with the sponsor. • Monitor timeline of deliverables and activities presented in the RFP. 	
Planning the reports process	<ul style="list-style-type: none"> • Develop the communication strategy and make preliminary decisions about the content, audiences and distribution of consumer reports. 		<ul style="list-style-type: none"> • Help with report prototype design and other technical issues, such as layout, use of graphics, and testing with consumers and other audiences.

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Sampling	<ul style="list-style-type: none"> • Determine the groups of individuals to be surveyed. • Assemble sample frame and provide it to the vendor. 	<ul style="list-style-type: none"> • Prepare a sampling plan for discussion with the sponsor. • Incorporate sponsor/consultant revisions into the plan. • Clean and prepare sample and review for accuracy, check and correct bad addresses, and obtain missing phone numbers. 	<ul style="list-style-type: none"> • Help the sponsor and vendor develop survey sampling specifications. (You will need a statistical consultant if you or the vendor does not have a sampling statistician.)
Questionnaire preparation	<ul style="list-style-type: none"> • Select CAHPS questionnaires. • Consider whether to add supplemental items. 	<ul style="list-style-type: none"> • Prepare questionnaires for mail and/or telephone administration. • Prepare survey letters for mailing. • Set up system for tracking the returned questionnaires and/or completed telephone interviews. 	<ul style="list-style-type: none"> • Advise sponsor about added items. • Develop and test new items.
Data collection	<ul style="list-style-type: none"> • Monitor the survey field period to ensure vendor adherence to quality standards. • Review and resolve problems in consultation with vendor. 	<ul style="list-style-type: none"> • Prepare training materials for telephone data collection. • Administer questionnaires by mail or telephone. • Monitor returned questionnaires and/or telephone interviews. • Submit weekly reports to sponsor detailing survey progress and response rates. • Inform sponsor of unanticipated problems and questions related to survey content and data collection. 	

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<p>Data preparation and analysis</p>	<ul style="list-style-type: none"> • Monitor data preparation and analysis. 	<ul style="list-style-type: none"> • Clean data file. • Calculate response rates. • Review analysis program instructions. • Modify program, as needed. • Run, test, modify, and rerun program. • Thoroughly check results. 	<ul style="list-style-type: none"> • Review CAHPS instructions and computer program for analysis. • Assist the vendor in using program and checking results.
<p>Report preparation and distribution</p>	<ul style="list-style-type: none"> • Customize report text and template design. • Monitor report preparation and production. • Provide specifications and additional information to be included in reports. • Supply additional display information (e.g., benefits). 	<p>(NOTE: The vendor for this task may be the vendor who conducted your survey or may be a different vendor.)</p> <ul style="list-style-type: none"> • Prepare CAHPS consumer reports or supply results to vendor preparing reports. • Thoroughly check all information in reports for accuracy. 	<ul style="list-style-type: none"> • Assist in interpreting survey results and incorporating them into reports for consumers and other audiences. • Provide guidance on layout, graphics, and design.