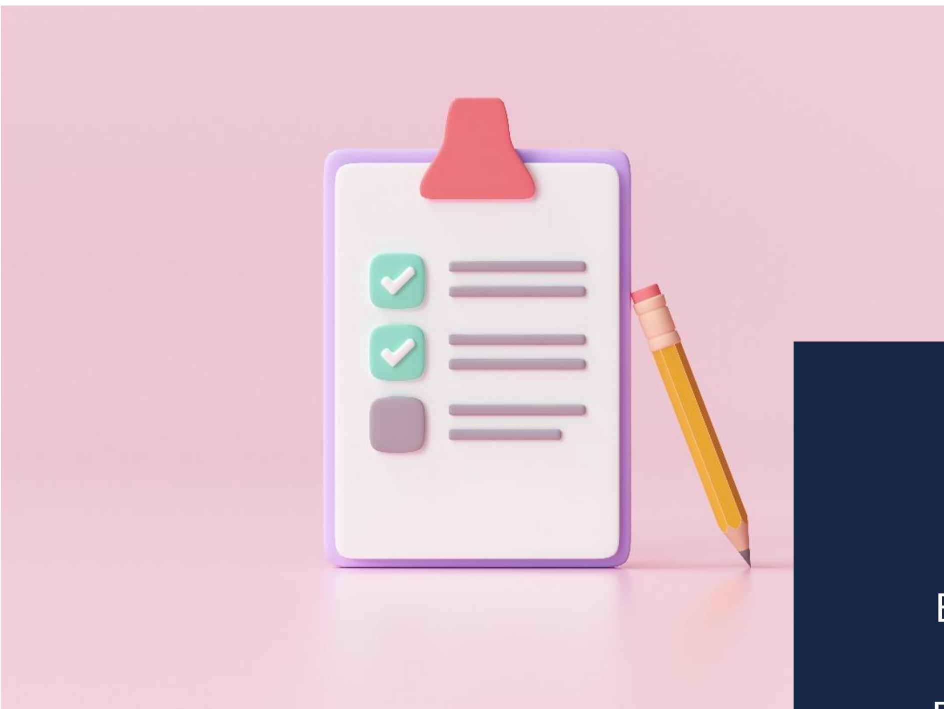
Houseless Client Feedback Toolkit



Published by the Mid-Columbia Houseless Collaborative Lived Experience Workgroup with support from Providence's Center for Outcomes Research and Education

November 2023

Mid-Columbia Houseless Collaborative
Shelter Services Housing Advocacy

CORE | Center for Outcomes Research and Education

Contents

Purpose and Background

How to Use this Toolkit

The toolkit was developed by the Mid-Columbia Houseless Collaborative's Lived Experience Workgroup with technical assistance from Providence Health System's Center on Outcomes Research and Education (CORE).

The toolkit aims to provide organizations who use it with an ethical, sound, and well-informed set of potential practices for collecting client feedback. Its primary focus is to enable Mid-Columbia Houseless Collaborative partner organizations to honor the lived experience of houseless clients while using data-driven opportunities to improve quality of services, client engagement, and satisfaction.

Regularly collecting client feedback helps ensure the region's supportive services are meeting client needs in a culturally responsive, trauma-informed way. The toolkit is meant to help organizations stay focused and committed to meeting the needs of clients across the five-county Mid-Columbia region.

Organizations serving houseless clients can maximize this toolkit by scheduling an initial planning meeting with program director(s) and frontline staff at the organization who engage regularly with houseless clients. At that meeting, they can:

- Use the guiding questions and exercises included in pages 5-14 to make decisions about:
    - What type of houseless client feedback process the organization needs;
    - What type of feedback process the organization can realistically put in place depending on capacity and other constraints; and
    - How and when to implement a client feedback process.
- Use or build on the templates included in the toolkit to jumpstart the houseless client feedback model or process selected. The resources included in the toolkit can be modified depending on the capacity and needs of each organization participating in the Mid-Columbia Houseless Collaborative.

Initial Planning Meeting Exercises: Selecting a Feedback Model for Your Organization

Program director(s) and frontline staff at the organization who engage regularly with houseless clients can use the exercises in the following pages to make decisions about what type of client feedback model their organization could realistically implement, and to ensure it is a strong model that successfully incorporates the values of lived experience, equity, and confidentiality.

Exercise #1: Choosing How to Use Feedback

Before your organization begins a client feedback collection process, it is important to ensure you are able to make good use of that feedback. Doing so honors the valuable time and energy your clients took to provide feedback; it also means your organization can improve your programs so clients experience ease of access, and better outcomes from quality services. The Mid-Columbia Houseless Collaborative recommends that organizations considering a client feedback process think through the following questions together before deciding what type of client feedback tools to use, and how to implement changes according to that feedback.

Key questions to consider as you plan for how to make good use of client feedback:

1) *How often can your organization realistically review the feedback and adjust your program(s) based on that feedback?* The Mid-Columbia Houseless Collaborative recommends a comprehensive review at least annually, but depending on your organization's goals and capacity, more regular evaluation of client feedback may make sense. For instance, monthly feedback review would be ideal for organizations who want to allow for rolling implementation of program changes based on client feedback in order to be as responsive to client feedback/needs as possible.

   Notes: ____

   ____

   ____

   ____

2) *Who will review the feedback?* Are members of your leadership team involved in that process, or just front-line staff? What are the benefits of including both in the feedback review process?

   Notes: ____

   ____

3) *Will you look at the feedback overall, or by subgroup?* For instance, could the feedback tell you a different story about how well your programs are supporting houseless clients if you break out the results according to the different demographic groups feedback came from?

Notes:

4) *How will you demonstrate/communicate to your clients what adjustments were made in response to their feedback?* "Closing the loop" is an essential component of collecting client feedback and shows that you value what your clients have shared. This could be done at a regularly scheduled event, or in another way that showcases improvements stemming from your client feedback process.

Notes:

Exercise #2: Honoring Lived Experience and Equity

A strong client feedback process can also support partner organizations of the Mid-Columbia Houseless Collaborative to better understand and address inequities within their programs. It should also honor the lived experience and expertise of the houseless clients who participate in that process. The personal insight and stories clients provide during a client feedback process can provide valuable insight for intentional, equitable change in policy, procedure, and/or programs. Allowing clients to feel seen and heard in a meaningful, equitable way influences organizational change, decision-making and service delivery.

Key questions to consider to honor the value of lived experience and ensure an equitable lens for your client feedback process:

1) *Is your process bilingual? i.e. can a client participate in the process in their native language or a language in which they are fully fluent?* Given the number of Spanish speaking clients we serve, it is strongly recommended that there be a bilingual option to collect client feedback. This could mean written materials are translated into multiple languages and offered accordingly to clients; it could mean interview processes and focus groups are facilitated in the language clients that attending them speak, or that there is an interpreter and time built in for interpreting.

   Notes: ____

   ____

   ____

   ____

2) *If you are asking for a notable amount of time from your clients to give you feedback (such as via focus group process), are you compensating them financially for their time and their lived expertise?* A good example of this is providing gift card incentives to clients once they have completed the feedback process.

   Notes: ____

   ____

3) *Does your process make assumptions about a baseline level of resources or access a client should have in order to be able to give formal feedback that will help improve your programs for unhoused populations??* For instance, if your process relies entirely on a digital survey that is emailed to clients, will the process be able to adequately incorporate feedback from clients who do not have a computer, smartphone, or regular internet access? Even if you offer written, in-person surveys to collect client feedback, will you also offer a way for clients to complete a survey verbally so they can participate in the process even if they cannot read or write?

Notes: ______________________________

Exercise #3: Selecting a Feedback Model

Depending on your organization's mission, programs, and capacity (number of staff, case management platforms/capabilities, etc.) the process of collecting and implementing feedback from houseless clients may look different. There is no perfect method for collecting client feedback, but if your organization is aiming to come up with a consistent way to do so, or to improve your current method for collecting client feedback, it is important to remember to select a feedback model that your organization can realistically and consistently commit to using.

The types of information that you would like to learn about your programming and services can also help to determine which model is more appropriate to use. For instance, there are different approaches you could take depending on if you want to put a bigger emphasis on qualitative vs. quantitative data—or an equal emphasis on both. Quantitative Data Collection:

- Answers the "How many" "How often" and "Who" types of questions.
- Examples: close-ended survey question, other numeric administrative/program data
- Pros: can typically collect data from a larger number of people allowing for better generalizability of findings, easier to repeat data collection on a regular basis, data can be anonymous
- Cons: unable to follow-up on responses to specific questions, participants cannot tailor their responses or add context

Qualitative Data Collection:

- Answers "why" in a way that is open-ended, giving houseless clients the space to provide greater detail about their motivations and reasoning in their own words.
- Examples: open-ended survey questions, interviews, focus groups, etc.
- Pros: allows for deeper exploration, flexible, encourages discussion
- Cons: can be harder to generalize findings to the full population, sample bias in who opts to participate, privacy concerns, requires skilled moderation

The Mid-Columbia Houseless Collaborative recommends taking notes on the following potential client feedback models. Note whether or not each of these models make sense for your organization to implement, and why.

Model A: One-time Written Survey at Program Exit. Collecting feedback via a brief, one-time written program exit survey completed by all clients within a particular program or programs is one example of a client feedback model an organization could implement. Clients could fill these surveys out themselves or do so with the help of a neutral intake or exit staff member. A sample survey that could be used in this type of model can be found in **pages 23-25** of this toolkit.

Notes: ____

____

____

____

- **Model B: Ongoing Feedback Collection Throughout Program Participation.** Collecting feedback on an ongoing, relational basis for the duration of a client's program enrollment is another example of a client feedback model an organization could implement. For instance, this could take place with the help of standardized question(s) caseworkers are trained to ask every time they engage with a client, such as on a weekly or monthly basis, or at various points throughout a client's journey, such as 1) when they are houseless and first begin engaging with your program, 2) right after they get back into housing, and 3) whenever they accomplish all the goals in their longer term housing and stabilization plan.

Notes: ____

____

____

____

- **Model C: Qualitative Feedback from Focus Groups or Interviews.** Collecting feedback less regularly, but during via qualitative opportunities such as focus groups or coordinated interview sessions, is another example of a client feedback model organizations may choose to implement. For instance, on an annual basis, you could invite all clients who participated in a particular program or had a particular outcome after participating in a program to attend two-hour focus group sessions. At the sessions, they could be asked a set of prompting questions that would allow them to share more about their experience, and help inform the process of improving your organization's programs in the future.

Notes: ____

____

____

____

Which model will your organization ultimately decide to use—one of the models proposed above, or a different model entirely? Or will you use a model the organization has already implemented but make some adjustments? Why?

Notes: ____

____

____

____

Regardless of which client feedback model you are going to use from this point forward, you'll need to iron out a few more details to make your plan for implementation:

1) *Who will collect the client feedback data? Will anyone support them?*

Notes: ____

____

____

____

2) *Who will they collect the client feedback data from?*

Notes: ____

____

3) *When will/should the client feedback data collection begin?*

Notes:

4) *How will the client feedback data be collected?*

Notes:

Exercise #4: Ensuring Client Consent, Safety, Confidentiality, and Comfort

It's important to remember that a client's participation in a feedback process is always voluntary and should hold no weight over the quantity or quality of services that a client receives from your organization, regardless of their willingness to participate. Reminding clients that they can choose to participate or opt out with no repercussions will be very important in alleviating any potential feelings of being pressured. Providing a detailed overview of the method(s) of how and why you are collecting feedback from the client will help them to be better informed in their decision.

For those clients who do opt to participate, you will want to ensure that they feel safe, comfortable and know that their feedback will be held confidential. Some questions to consider are below. The answers to these questions can impact the level of feedback the client is willing to share and their experience when giving it.

1) *Who is asking for feedback?* If they are receiving assistance completing these questions, or being asked verbally, is this being done with someone familiar and that they are comfortable with?

   Notes: ____

   ____

   ____

   ____

2) *Where and how are clients being asked?* Is this being done in a group setting? Individually? Are they in a setting that they are comfortable with? Is the administration method (paper, online, focus group) something that they are comfortable/familiar with?

   Notes: ____

   ____

   ____

   ____

3) *How often are they being surveyed?* Be cognizant of survey burnout and consider that they may be being asked for feedback at other agencies.

Notes: ____

____

____

____

Making Good Use of Your Houseless Clients' Feedback Data

Once you have collected clients' feedback, it is important to make sure that valuable information does not end up sitting on a shelf being unused! The following pages provide helpful tips and tricks for how to process, prepare, and analyze client feedback data so you can make good use of it to improve your organization's work to serve houseless clients.

Processing and Preparing your Data for Analysis

Processing and preparing your data is a critical step! Any strategies your organization uses to explore and understand your data will be hampered if you do not have a handle on data quality (garbage in = garbage out). Processing and preparing your data include all of the steps you take to organize the data in a way that will be useful for your analysis as well as any quality checks to ensure data quality.

Tips for Processing & Preparing Data

The information you collected is likely in a raw format. Some examples of raw data are:

- Completed hardcopy surveys
- Audio recordings of interviews or focus groups

Data Cleaning and Processing

1. **Enter** your data.
    a. *Quantitative data:* enter data into a table format into the spreadsheet. Using one row per participant with data from the same questions in columns is a common format.
    b. *Qualitative data:* type up all the data into a word processing program such as Microsoft Word.
2. **Save a backup** copy of your original data.
3. **Organize** data.
    a. *Quantitative data:* assign each participant a unique participant ID. You may assign some responses numerical values to aid analysis using computer software. You can track this process in a code book that lists each variable/question name, all of the answer options for each question, and the numerical code you have assigned to each response option.
    b. *Qualitative data:* Create a file for each interview, observation site, focus group, etc. Within each file, organize the data by question, time intervals, and/or topic (depending on what method makes the most sense).
4. **Clean data:** Identify errors, unusual values, outliers (very high or low numbers) and missing data.

a. *Quantitative data:* use tools in Excel or Google Sheets:
    i. Spell check
    ii. Filters: Use to look at all values, sort values, and include or exclude values you see in a column. Can be used to quickly identify missing or unusual data.
    iii. Find/Replace: Can be used to find all instances of a specific value in a worksheet, and replace those with another value.

b. *Qualitative data*: you can randomly select interview to spot check whether participants' words were transcribed accurately and are attributed to the right individual comparing the recording with the written transcription.

5. **Document**: Write down the steps you take to process and clean. This helps you repeat the same steps each time you work the data and communicate to others who are working with or looking at the data understand the changes you have made.

Additional Resources for Data Processing and Preparation:

- The Data Cleaning Toolbox — Eval Academy
- Enter, Organize, & Clean Data « Pell Institute
- The Capacity Collective's Data Quality Excel Tips & Tricks

Get More from your Data through Analysis

Basic Quantitative Analysis

- **Tabulate your results.** Use frequency or percent distributions to tabulate your results for the different variables in your data. This process will give you a comprehensive picture of what your data looks like and assist you in identifying patterns.
- **Calculate descriptives**. Use Excel's basic functions to calculate averages or means, minimum and maximums, medians and modes. counts, sums, percentages, averages. Learning a handful of tricks (Filter, COUNTA, Pivot Tables) in Excel can go a long way to helping summarize and make sense of spreadsheet data
- **Disaggregate your data.** After tabulating the data, you can continue to explore the data by disaggregating it across different variables and subcategories of variables such as gender, race, ethnicity, and preferred language. Be aware of reporting out on small numbers, this may impact clients' confidentiality.

Tip: For both quantitative and qualitative data, your analysis can easily be skewed by **outliers** (unusual responses). For quantitative data you may consider using the median instead of average to find the "center" of the dataset. If you find a distinct response in qualitative responses, you can note for example "one respondent noted …."

Basic Qualitative Analysis

- **Process data immediately.** Take good notes immediately following an interview or focus group. You should record detailed notes on the experience noting things that stuck out to you, time/date details, highlights from the interaction, and other observations.
- **Read through all the data.** After you have completed data collection, read through your data again to refamiliarize yourself with the information you heard.
- **Organize comments into similar categories**. This might include concerns, suggestions, strengths, weaknesses, similar experiences, program inputs, recommendations, outputs, or impacts. Once you have grouped comments into similar categories, you should label the category.

- **Attempt to identify patterns**, or relationships in the themes. For example, did all people who attended programs in the evening had similar concerns? What are the processes or events that clients might experience during the program that lead to these concerns?
- **Draw conclusions.** Step back and try to make sense of what all of your findings mean. Determine how your findings help answer questions of client satisfaction or need. You can then begin to think about implications of your findings.

Additional Resources for Data Analysis:

- Analyze Quantitative Data « Pell Institute
- Analyze Qualitative Data « Pell Institute

Making Meaning from Your Data

To make the most of the data collected and analyzed through your feedback process, it is important to spend time exploring the data to help make meaning from the data. This will help you identify areas of success and celebration as well as gaps to address; monitor progress toward goals; and provide insight to guide decision-making and inform next steps to improving future programming.
We recommend a three-step method to make more meaning from your data:

1. **Scan.** Have your team start by getting a 10,000-foot view of your data landscape. Establishing a high-level overview of the data will help you to make better informed decisions about which aspects of your programming require additional attention.

   Some questions to consider:
   - Who provided client feedback? Is this representative of the people you serve? Who is missing?
   - Based on the responses you got from clients, what are you doing right now that seems to be working? Where did your organization score well?
   - What is your organization doing right now that needs to be improved? Where did your organization score poorly?

- What do these data tell you about how your houseless clients are experiencing services at your organization? What connections or patterns can you start to see between the highest and lowest rated components of your program?
- Do the data tell a different story if you breakout responses according to subgroups, such as by different demographics/client identities, or by how long your client has participated in your program?
- Is there any follow-up work you need to do with clients, or more feedback you need to collect, to better understand some of the themes this data is showing us?
- If this is not the first time you have used this client feedback process, how does this round of client feedback compare to the last time you analyzed client feedback? What does that mean about your organization's services and any improvements you have (or have not) made based on previous feedback from houseless clients?

Once you have identified a few different data patterns, your team should prioritize one or two to explore more deeply.

2. **Analyze.** In this step you and your team will aim to understand the factors driving the pattern(s) you identified in the scan phase. Understanding the underlying reasons behind the patterns you selected with help to identify specific, actionable steps to address issues/concerns raised by your houseless clients.

   One activity you can try in this phase is The Five Whys.
   The Five Whys: In Five Whys, state the pattern you observe, and then ask "why?" five times. It's a great way to get beyond surface observations. **(This section has been adapted from:** Public Housing and Process Improvement: How Asking "Why" 5 Times Can Help You Get To The Root Of The Problem – International Observatory on Social Housing (internationalsocialhousing.org))

   Problem Statement: Houseless clients are returning incomplete applications
   Why are applications coming back incomplete
   - Our customers are confused about what they need to fill out

Why are our customers confused about the paperwork they are filling out?

- Because we make them fill out so much paperwork.

Why do we put so much paperwork in the file?

- Because HUD makes us fill out so many forms?

Why does HUD make us fill out so many forms?

- Actually HUD only makes us do two forms, the rest are ours

Why do we have so many forms?

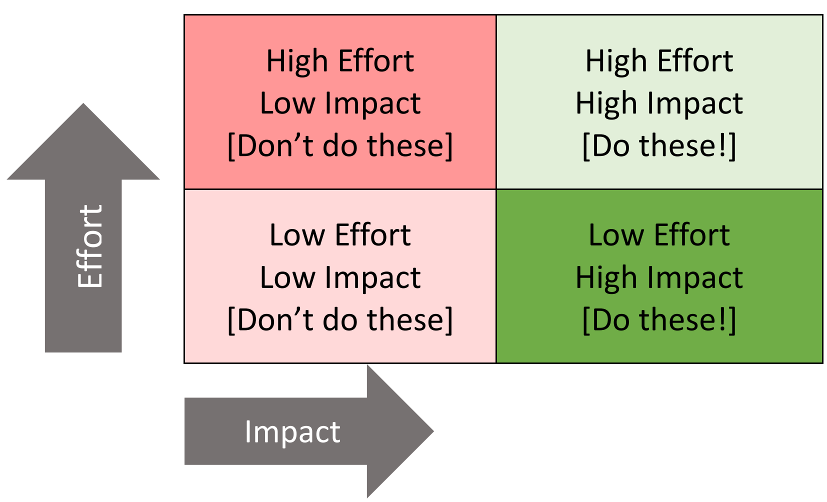
- Well, Bob who used to be the manager 7 years ago thought we needed these 7 forms to protect us just in case.

This is a great opportunity to brainstorm with staff, houseless client advisory groups, and/or the communities you serve.

3. **Prioritize**

To make sustainable changes at your organization based on the feedback you have received, it is important to focus on doing a few things differently at a time. The learnings collected in the Analyze phase can be used to inform the highest value opportunities for making change at your organization.

You can use a quadrant table like the one illustrated below to sort through different options. The quadrant table below maps the options in terms of both impact and effort, helping to identify the easy wins (options that are low effort and high impact).



Resources

The following pages include templates and other resources that could be helpful to your organization as you are choosing and implementing a client feedback process.

Sample One-time Written Survey at Program Exit (Model A)

Sample Survey

We want to make sure you receive quality services in the way that works best for you. Please answer the following questions honestly. Your feedback helps us improve our services and will be kept anonymous. This survey should take no more than 10 minutes to complete. Thank you for your input!

Part 1. Client Feedback Survey

These questions ask you about your experience receiving services at [ORGANIZATION]

Please select service(s) that you received at [ORGANIZATION]:

- ☐ Information and Referrals
- ☐ Household Utility Assistance
- ☐ Weatherization Services
- ☐ Utility Education Classes
- ☐ Shelter & Transitional Housing
- ☐ Assistance to Prevent Eviction
- ☐ Senior and Low-Income Discount Programs
- ☐ Supportive Services for Veteran Families
- ☐ Health Care
- ☐ Day Center
- ☐ Youth Center
- ☐ Food/Nutrition Assistance
- ☐ Transportation Assistance
- ☐ Other__________________________

2. Tell us about your experience receiving services at [ORGANIZATION]:

	Strongly Agree	**Agree**	**Disagree**	**Strongly Disagree**	**Does not apply**
A. The services I received helped to meet my needs	ð	ð	ð	ð	ð
B. The services I received improved my quality of life	ð	ð	ð	ð	ð
C. The services I received helped me feel more equipped to enter safe and stable housing long-term	ð	ð	ð	ð	ð
D. Staff were friendly/helpful and respectful	ð	ð	ð	ð	ð

E. Staff honored my cultural background, beliefs, and traditions					
F. I felt a sense of community at [ORGANIZATION]	ð	ð	ð	ð	ð
G. I was satisfied with the services I received	ð	ð	ð	ð	ð
H. I would recommend this program/organization to others	ð	ð	ð	ð	ð

3. What did you find to be the most helpful to you with your services at [ORGANIZATION/PROGRAM]?

4. What are some things about our programs or services that we could improve?

5. If our programs or services were not able to help you address your needs, what was your experience working with our organization? Check all that apply:

   ☐ Staff at the organization helped refer you to other resources
   ☐ Any referrals that staff made were appropriate and helpful
   ☐ Staff helped you access culturally relevant or responsive services
   ☐ Staff helped provide assistance needed to navigate through the process of applying for other services (like obtaining or compiling relevant documentation, filling out paperwork, etc.)
   ☐ I did not feel like staff made any effort to connect me to other resources that could help me address my needs
   ☐ I felt like staff made an effort to connect me to other resources, but my needs were still unmet because ____
   ____

6. Is there anything else you would like to share with us? Please tell us honestly how you felt about the services you received:

Part 2. Demographics

These questions tell us more information about you.

7. I am:

   ☐-Female/Woman
   ☐-Male/Man
   ☐-Non-Binary/Third Gender

☐-Prefer to self-describe ______________

8. I identify as Transgender:
   ☐-Yes
   ☐-No

9. I am:
   ☐-18 to 29 years old
   ☐-30 to 44 years old
   ☐-45 to 64 years old
   ☐-65 years old or older

10. I consider myself to be (*X all that apply*):
   ☐-African American/Black/African
   ☐-Native American/Alaskan Native
   ☐-White/Caucasian
   ☐-Latina(o)/Hispanic
   ☐-Asian American/Asian
   ☐-Middle Eastern
   ☐-Native Hawaiian/Pacific Islander
   ☐-Other (please describe)________
   ☐-Indian

10. How many adults are in your household (over 18, living together)? ____________
    How many children? ________________

☐-Please X if you give us your permission to share your comments on promotional materials and/or funding reports. Again, this information will remain anonymous.

Readability and Plain Language Tools

All organizations using this toolkit should be thoughtful about the potential of overlapping surveys. Clients may be receiving services from multiple agencies at once, and therefore will most likely be surveyed by each of those agencies with the potential of overlapping questions. Please use the below sample list of questions as a guide but be encouraged to make the questions your own by modifying them to best inform what you would like to know about your agency. It is also highly encouraged for equitable access to utilize plain language down to a 5th grade level.
Plain Language Online Resources:

- Basic Info
    - http://www.clearlanguagegroup.com/plain-language/
    - Plain Language for Public Health
- Quick Check List
    - http://www.maximus.com/sites/default/files/MAXIMUS_CHL_PlainLanguageChecklist.pdf
- Readability Resources - to assess the readability level of a document.
    - Microsoft tools to assess readability
    - www.readabilityformulas.com – a variety of calculations for grade level assessment and free readability test
    - https://www.online-utility.org/english/readability_test_and_improve.jsp - Free assessment with specific suggestions of sentences to edit
    - https://legible.es/ - This is a free assessment tool for Spanish materials. The grade reading level is NOT in the tables of information, but can be found where it says: Más cálculos: * Nivel de grado