DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT

# HOMEKEY CLIENT ENGAGEMENT TOOLKIT

BY HOMEBASE

# Homekey Client Engagement Toolkit

This HCD Toolkit is intended to be a resource for providers of Homekey and other programs seeking deeper engagement with their clients. Feedback efforts should provide opportunities for both anonymity and accessibility for clients.

There are a variety of mechanisms providers can use to gather client feedback. Offering different opportunities enriches the feedback process. For example, providers can:

- Create client feedback loops
- Establish Client Advisory Boards
- Distribute surveys
- Convene focus groups
- Appoint clients to the organization's board
- Hold town hall-style meetings
- Create a client newsletter
- Collect comment cards on specific topics

The Homekey Client Engagement Toolkit includes practical fact sheets that providers can use to guide their client feedback processes. Each fact sheet has important information about how to obtain feedback from clients served in Homekey programs.

The Toolkit includes:

- Ongoing Insights through Feedback Loops

  Feedback Loops provide the opportunity to collect, reflect, and act regularly on anonymous feedback from all clients of Homekey. They also inform clients about progress made over time. They are best used on an ongoing basis to get regular and consistent feedback from all clients and to share information back with to all clients for maximum engagement.

- How to Set Up a Client Advisory Board

  Client Advisory Boards (CABs) provide a formal, ongoing structure to gather feedback about how current or past participants experience the program. They can identify gaps in care and ways to improve service delivery. CABs provide an opportunity to receive ongoing feedback and to share information back to a representative group of clients.

- Guide for Planning Client Feedback Survey

  Client Feedback Surveys provide a way to collect anonymous feedback from clients. They can be used to assess satisfaction and collect suggestions for program improvement; to identify patterns and shared opinions across a group of clients. They are not effective for collecting detailed or complex feedback.

- Sample Client Satisfaction Survey

  A sample Client Satisfaction Survey offers guidance to collect anonymous feedback from clients.

- Guide for Planning a Focus Group of Clients

  A Focus Group of clients provide more detailed feedback than a survey. They provide less detailed feedback than one-on-one interviews, but they allow you to explore what is important across a select group of clients and to provide an opportunity to have clients hear from one another.

- Sample Focus Group Question Guide

  Sample Focus Group questions offer guidance to plan for, structure, and facilitate a focus group of clients.

- Compensating Clients for their Time: Stipends

  Stipends provide compensation to clients for the valuable insights and experience they bring to the feedback process. This document provides guidance for stipend amounts and discusses how stipends can impact a participant’s eligibility for public benefit programs.

- Accessibility & Readability Principles

  Providing accessibility and readability in written materials for clients can ensure that text is easy to read and accessible to individuals with disabilities or who have barriers to access (e.g., lack of internet).

- Sample Anti-Retaliation Policy

  This sample policy offers boilerplate language that organizations can use to develop policies to ensure that clients providing feedback are not retaliated against.

The California Department of Housing and Community Development (HCD) does not require that Homekey providers use any of these tools. Rather, this toolkit offers options for projects to use to collect feedback from clients. Each project can determine which client feedback mechanisms to use.

# Ongoing Insights Through Feedback Loops

## Overview

Regular feedback from clients is important. One of the best practices organizations can adopt to get ongoing insights from clients is to set up a **Feedback Loop**.

Feedback Loops typically include four phases:

1. **Listen**: Take seriously the feedback that clients provide. Listen to what they share, share it with staff, with leadership, and with other partners.
2. **Reflect**: Take time to consider the client feedback received. Discuss it with all clients and among staff and volunteers. Spend time brainstorming how to respond.
3. **Act**: Be flexible. Try new things. Prioritize changes that can be made quickly where results will be immediate. Consider pilot projects for big or longer-term changes.
4. **Inform**: Close the loop with clients. Share with them how their input was used.

A primary goal of Feedback Loops is to be more responsive to client feedback, with the intent to improve programs and services. Follow-up ensures that clients who have spent time providing feedback feel valued, seen, and heard. Follow-up fosters trust in the process and incentivizes future client engagement opportunities.

Regardless of the frequency of client input, each input opportunity should be accompanied by proactive tracking of how client engagement is being incorporated by the organization.
This document will cover promising practices for initiating and sustaining feedback loops with clients.

## Feedback Loop Benefits

A Feedback Loop provides the opportunity to collect, reflect, act, on client feedback, as well as inform clients about progress made over time. It is not a “one and done” activity. When it is in place, a Feedback Loop can:

- Offer a regular and consistent way to get feedback from clients;
- Ensure programs effectively address the needs of the people they are meant to serve;
- Build a two-way relationship that can reduce staff burnout, boost joy, and make serving others sustainable;
- Establish working partnerships that empower clients and foster self-determination;
- Provide a seat at the decision table, a simple way to bolster client belief in self-advocacy and to build rapport and trust between clients and staff;
- Boost client engagement and investment in programs;

- Provide opportunities for clients to develop leadership skills;
- Foster accountability and greater responsiveness from staff and organizational leaders; and
- Improve systematic understanding of impacts on clients, client preferences, and client experiences.

## Feedback Loop Best Practices

Creating a safe space for feedback—both physically and through strong guidelines and policies—can establish a climate that will bring in honest feedback. Feedback Loops should allow for unfiltered feedback, with no judgment, to encourage candid and helpful input.

While there are many ways organizations can get feedback (e.g., surveys, focus groups, Client Advisory Boards, etc.). there are some basic components that should be considered for any input process:

- Create opportunities for candid feedback;
- Ensure diverse and representative input;
- Seek input that is intentional and purposeful;
- Prepare to use of a variety of tools;
- Establish a regular and consistent opportunity for ongoing feedback; and
- Follow up and follow through.

> Regardless of the particular approach programs adopt to solicit feedback, clearly communicating the values and goals behind the effort is important. From the outset, programs should let clients know what kind of input they seek and for what purpose.

## Create Opportunities for Candid Feedback

It is important to get feedback that is honest and constructive. To ensure the climate allows for candid feedback, programs need to:

- Allow for **both direct and anonymous feedback**;
- Identify **secure and private space(s)** where written surveys can be self- or peer-administered and provide an option to submit input into a locked comment box;
- Ensure feedback meetings with clients are **closed to staff and conducted by a third-party or peer liaisons**;
- Adopt policies and procedures that **protect the confidentiality of clients** and empower them to freely express their concerns.
    - For example: Develop an anti-retaliation policy for staff (See the Sample Anti-Retaliation Policy in the Toolkit), and explain what it is and how it can be used; and
- **Reassure clients that there will be no consequences** when providing negative feedback and/or constructive criticism.

## Ensure Diverse and Representative Input

Make a concerted effort to obtain client input that is representative of the demographics of the people a program serves. Representative feedback can ensure that policies and guidelines take into consideration the diverse needs, experiences, and preferences of actual clients. Look beyond the traditional demographic criteria (i.e., age, gender, race/ethnicity, sexual orientation, veteran status, etc.) to seek input from people who may not be outspoken, who may be introverted, or who are not always comfortable speaking in groups.

To capture meaningful diversity and representation in the feedback, require the use of more than one mode of feedback; it may require that programs remove barriers to participation to foster participation from a wider group of clients.

Consider the following when planning out feedback processes:

- Is the location for feedback convenings **accessible**?
- Are meetings held over different times to ensure **participation** from people who work, go to school, or who are parents?
- Are there **options** to offer clients who want to participate who are introverted who may prefer a survey or an interview?
- Can the provider offer **accommodations** for individuals with disabilities or who have limited to no English proficiency, as well as Deaf, hearing- or vision-impaired, or blind persons?
    - For example, accommodations could include translating a written document into another language or offering live interpretation. This could also include offering written materials in Braille.

## Seek Input that is Intentional and Purposeful

Be intentional and transparent about the goals and purposes for gathering feedback. By being clear and direct, programs are more likely to get clients engaged in an impactful way.

Programs should let people know why they are seeking feedback and what they intend to do with the feedback. Create processes that are genuine and build in time to learn and adapt.

Seek input that allows programs to:

- **Start with the priorities that are most important to clients** and build organizational commitment to address them;
- Ensure client engagement **informs program operations in a significant and meaningful way**.
    - Provide adequate professional development and support to facilitate pathways to employment that progress beyond peer support towards leadership positions; and

- **Require buy-in and support from senior leadership** to be sure that client engagement informs core program design.
    - Buy-in can take the form of program leadership staff attending consumer advisory board meetings and then reporting back to the organization's board of directors or other management.

### Prepare to Use a Variety of Tools

There are many options to gather client feedback:

- Online or paper surveys;
- Comment boxes;
- One-on-one interviews;
- Focus groups;
- Community meetings
- An organizational chart (with contact information) that is posted throughout the program site;
- Office hours available for supervisors/site leaders to allow for client feedback; and
- Onsite feedback terminals for clients to use when entering/exiting a building or when waiting for appointments.

Programs have many options to gather feedback, and the tools they use should be targeted to specific programs and the group of individuals that they serve. If one tool does not work as intended, put it aside and try a different one.

Be patient, as it may take clients a few rounds of feedback before they are comfortable with a tool. Perhaps they will need to see how programs adapt or change based on feedback before they embrace the full effort.

### Establish Consistent Opportunities for Ongoing Input

When deciding how frequently to gather client input, programs should be prepared for the time it will require to collect the feedback, analyze the results, initiate change, and see results.

Consider the following when determining the frequency of any Feedback Loop:

- Create a process to **allow for adjustments** to be made in real time.
    - Higher frequency feedback creates a more iterative process (which allows for back and forth between programs and staff) but requires a quick turn-around time for staff;
    - Less frequency allows more time for change but may not meet the needs of clients;
- Remain **mindful of the time and emotional labor** that providing and evaluating feedback takes—both on staff and clients; and

- Aim to be as **low-burden** as possible while retaining **maximum impact**. Think about how to streamline the process so that over time it is easy to manage, both in terms of gathering feedback, but also in terms of implementing recommendations.
  - For Example: Our House in Little Rock, Arkansas installed "happy or not" voting terminals that pose a daily question and require the client to simply push a button to share their opinions. This strategy is low-commitment and high-impact, enabling the organization to gauge satisfaction and identify topics that need further exploration.

### Design an Intentional Feedback Collection Processes

Set up systems to maximize participation and meaningful feedback from clients. Mindfully craft questions, test the best methods to administer them, gauge both overall participation and the representativeness of participants, and obtain data that are as complete as possible.

- **Use neutral parties to assist clients with questions** (i.e., a third party) to overcome courtesy bias and help clients feel safe.
- There are no perfect feedback questions. Ask clients  to help you understand **what the questions mean to them**, and plan to make changes.

Courtesy Bias: The tendency of clients to understate dissatisfaction to avoid offending organizations that provide them with services they need).

- If you solicit open-ended information, also **ask general questions** for the greatest response rate.
- When possible, **use digital methods or allow clients to self-administer** feedback questions to maximize privacy.
- **Use client input to select stipend** distribution methods (e.g., should we offer a gift card to a gas station or convenience store?).
- **Match feedback collection methods to agency capacity**. Informal, on-the-spot conversations might be better for when agencies lack sufficient space to host private conversations.
- Provide **compensation for client participation**, such as Visa gift cards.

### Reflect, Act, & Inform

It is not enough to simply listen or collect feedback. Providers should also reflect and act on the feedback, as well as inform clients of how their feedback was used.

**Reflect:** In the reflect phase, engage clients, agency staff, and volunteers as inclusively as possible to interpret client data and decide on solutions. The reflect phase can include

community meetings, smaller workgroups, and direct conversations with clients focused on data collected during the listen phase.
Consider the following as you prepare:

- Embrace positive feedback and **negative feedback**. Resist the temptation to inflate, disavow, or react defensively toward negative feedback;
- **Gather recommendations from staff and clients** about how to act on the feedback;
- **Train facilitators** on how to lead reflection conversations, stay neutral, create space for clients to contribute, and keep the conversation on track;
- Choose **public methods to share data** when the data covers issues that are less sensitive or volatile. Choose **private methods** such as interviews and focus groups when there is a higher need for confidentiality or sensitivity to the topic;
- **Recruit clients both in advance and on the day of** reflection activities to ensure enough participation and a diversity of experiences;
- **Allocate sufficient time** to process feedback and plan appropriate responses. Talk through these issues with staff or peer organizations; and
- Take deliberate steps to ensure that staff and volunteers can reflect on client feedback data and offer suggestions for improvements **separately from clients**.

**Act**: In the act phase, implement actions based on client feedback. The act phase could include as many or as few actions as needed to respond to client feedback. Some actions may take several years and it’s important to share that extended timeline with clients.

Do:

- Prioritize actions when there is consensus with clients and staff about the importance;
- Implement actions in stages or try out proposals in small pilot projects;
- Collect data on new strategies to determine their effectiveness (e.g., a quick survey about experience with the change); and
- Adjust the course of action if initial strategies are not effective.

Don’t:

- Don’t be afraid to try things to respond to feedback;
- Don’t keep changes secret. Make sure all staff and clients are aware of the change and the reason for the change; and
- Don’t be surprised when implementation is difficult. This work is challenging and change is difficult.

**Inform**: In the inform phase, communicate changes back to clients, staff, and partners. Closing the feedback loop is essential for building trust and encouraging participation in future feedback efforts.

Clients will appreciate information about the following:

- **How was the information used?** It can encourage them to share their perspectives in the future.
- **How were decisions made?** It is especially important to share what their role was in the process.
- **What was learned from their feedback?** Share insights gained and perspectives that were shared during feedback collection and reflection.
- **What is the agency doing in response?** This can help clients feel that their input is truly valued and respected.
- **What feedback was not adopted?** Provide the context and reasoning when particular changes they suggest cannot be made. This can help build trust in the process.

When informing clients, remember:

- Do not forget to **close the loop with staff and volunteers** to include them in the process and **train them to close the loop through face-to-face interactions with clients**. This method is the most effective way to close the loop.
- **Do not rely on passive methods** such as posters, flyers, or videos to close the loop with clients.
- Set aside **sufficient time and resources** to close the loop with clients. It takes longer than one might expect.

# How to Set Up a Client Advisory Board

## Overview

For many years, there were no formal structures to collect insights and advice from the people most impacted by homeless service programs: people with past or current experiences of homelessness. More recently, many providers have created client advisory boards to gather input and share decision-making power with program clients. This document outlines the process for setting up client advisory boards.

## Benefits of a Client Advisory Board

Client Advisory Boards (CABs) are used to gather feedback about how current or past participants experience the program. They can identify gaps in care and ways to improve service delivery. CABs provide benefits to individual participants **and** to providers seeking feedback.

CABs can:

- Empower clients; and
- Create clear lines of communication between leadership, staff, and clients.

With sufficient planning and engagement, CABs can become an integral part of an organization.

## Best Practices for Forming a Client Advisory Board

It is important to plan to ensure the Client Advisory Board (CAB) is structured in a way that fits the needs of both the provider and the clients. When putting together a CAB, providers should take steps to:

- Get buy-in from board members and senior leadership;
- Work with clients to identify the goals of the CAB;
- Provide staff support;
- Create an inclusive recruitment process;
- Provide orientation to all members; and
- Remove barriers to participation.

### Get Buy-in from Provider Management and Senior Leadership

It is important that all program operators, managers, and partners are committed to acting on feedback from the CAB. While they are not typically decision-making bodies, CABs act in an advisory role, working in partnership with a program site's leadership team to improve the lives of people experiencing homelessness.

> To maximize impact, CABs and provider Boards should **communicate regularly**. For example, the provider Board agenda could include a regular update from the CAB.

Support from provider Board members and leadership is necessary. The Board should vote to establish a CAB. The Board should create a budget for the CAB, that includes funding for stipends, Board activities, and staff support.

## Work with Clients to Identify the Goals of the CAB

Providers and clients can work together to identify the goals and purpose of the CAB. CABs can have a variety of goals. They can:

- Ensure clients have a voice in the program;
- Provide input on services;
- Advise leadership how to best meet clients' needs;
- Provide feedback and concerns about policies;
- Alert project leaders to any issues with site operations;
- Create a space to resolve differences between the provider and clients;
- Empower clients to work together to resolve issues;
- Advocate for people experiencing homelessness within the agency and in the broader community; and
- Build leadership skills amongst clients.

Each staff member and client will have different goals for the CAB. It is vital to the consensus-building process to collect all of the different perspectives. An understanding of the different goals for the CAB will create a strong foundation to recruit CAB members. Ultimately, CAB members should have power to identify the final goals of the CAB.

## Provide Staff Support

Organizational support is essential to the effective operation of a CAB. Staff can support the CAB by providing a place to hold meetings, assist with organizing meetings, take minutes, and provide reminders about upcoming meetings. They can also process and manage stipends for CAB members.

In the early stages of the CAB, staff also can help members set up meeting protocols. They can suggest agenda items, facilitate conversations about developing goals, and help the group set ground rules for meetings.

Staff should always look for opportunities for members to raise issues for discussion and ultimately lead the CAB. As the CAB becomes established, the level of staff support should be dictated by CAB members.

## Create an Inclusive Recruitment Process

CAB members should include current or past clients. CABs can include current or past clients from throughout the agency, or specific to a single program or set of programs. The CAB should represent the diverse range of clients served by the provider. It should include members with different preferences, needs, and experiences. Members might include families, individuals, people with physical disabilities, and people who use mental health or substance use services. Other representation of diversity might be age, race, ethnicity, gender, sexual orientation, or veteran status.

The provider can recruit CAB members, accept applications, or both.

- If the provider **recruits members**, they can ask for nominations from staff or other program clients.
- If the provider **accepts applications**, they need to identify the criteria they will use to select CAB members. People with lived experience of homelessness should develop and review the application and marketing materials before they are distributed.

Some organizations may find it difficult to recruit CAB members. To cultivate a pool of potential members, agencies can develop a "ladder of engagement" for clients to take on an increasingly active role in the CAB, if desired. For example, clients could attend a few meetings and provide feedback. If they are interested, they can become an official member with voting responsibilities.

The provider should ensure a fair selection process, which might include a review committee comprised of staff, Board members, partner organizations, and clients who chose not to apply for membership. Depending on the size of the client base, it can be beneficial to begin with an open membership (e.g., anyone who submits an application becomes a CAB member), with the understanding that some applicants may leave after the first few meetings.

The size of a CAB can depend on the size of the population represented. Many CABs begin with a large membership (15+ members), become smaller (5 to 10 members), and then even out over time. If necessary, CAB leadership can add members, as they identify the need for more diverse representation from the population of clients.

## Orient New Members

Opportunities to meet one another and form relationships amongst CAB members are essential during orientation. In the first few meetings, staff will want to build connections between CAB members, identify the initial goals of the CAB, and create standards for meeting structure. Providers may lead CAB members through several ice breakers to build connections between members. A large portion of the orientation session(s) can be focused on “get to know you” activities.

Members should review the potential goals for the CAB collected for other clients, staff, and board members. They can discuss their own motivations for joining the CAB. Ultimately, the CAB will identify the final goals and a place to begin their shared work.

The CAB will need to set up agreements for how meetings will be run. They might want to develop shared rules or a code of conduct that to ensure meetings are run smoothly, equitably, and fairly. They will want to discuss whether there are specific leadership roles needed to run meetings smoothly (i.e., chair or co-chairs).

Once the CAB has established final goals and the meeting structure, the agreements should be formalized in writing. The agreements can include expectations for members such as:

- Meeting attendance
- Meeting frequency
- Participation goals

## Remove Barriers to Participation

To the extent possible, meetings should be held at the same place, on the same day of the week, and at the same time each month. The meeting place should be accessible to all CAB members.

Special consideration should be made to accommodate residents with disabilities. Language interpretation services and document translation should be offered to ensure that residents with limited English proficiency can fully contribute. Members can also be encouraged to participate by providing stipends, such as gift cards, or by serving meals and providing childcare during meetings. See Compensating Clients for Their Time: Stipends for more information.

# Guide for Planning a Client Feedback Survey

### Overview

There are promising practices organizations can rely on to build effective survey processes for clients with lived experience of homelessness (“clients”). Clients have a unique understanding of the strengths and challenges of a provider’s response to homelessness. This document includes tips and tricks to make surveys impactful and accessible to clients.

### When to Use a Survey

Surveys can be used to support a variety of efforts, including to:

- Assess satisfaction (e.g., relationships with staff, feelings of safety on-site); and
- Collect suggestions for program improvements (e.g., services for pets, new intake processes, employment programs).

Surveys are one method to collect client feedback. They can help identify patterns and shared opinions across a group of clients. They can help gauge whether there is consensus amongst clients or a wide variety of opinions or experiences.

Surveys are not good if detailed or complex feedback is needed. Other ways to collect information – for example, focus groups, interviews, a client advisory board or resident council – may be more effective than a survey in those contexts. Please see How to Set Up a Client Advisory Board in the Toolkit for more information.

### Five Steps for Client Surveys

To create reliable and useful client surveys, programs should follow best practices at five stages:

1. **Plan**

   Engage clients with lived experience to set goals and review policies and procedures governing surveys. If applicable, develop a budget for stipends or other costs associated with surveys.

2. **Design**

   Develop an introduction, draft a series of questions, and determine what specific demographic information would be helpful to learn about survey participants.

3. **Recruit and Distribute**

   Recruit survey participants to ensure there is adequate and diverse representation of clients.

4. **Analyze**

   Collect survey responses and analyze results to understand feedback provided from participants.

5. **Follow up**

   Review analysis and determine next steps, which may include changing policies or practices.

## Plan

Plan and be purposeful about how a program will use survey responses. Be sure the questions asked will provide information that is needed from clients.

**Involve clients**: From the start, include clients in planning and distribution of the client survey. Clients should be on the planning committee, test the design and the language of the survey, draft or review steps for distribution, and be part of the analysis processes.

> In general, clients should receive **stipends** for $20 to $25 an hour for participating in the survey process. Please see the Compensating Clients for their Time: Stipends in the Toolkit for more information.

If a program already has a Client Advisory Board, leverage those members to lead the work.

**Review policies and procedures**: It is important to update program policies and procedures to reflect the survey processes that are used. Policies may need to:

- Describe the **frequency** of survey processes at the agency (ideally, at least annually);
- Identify the **high-level steps** used to gather and evaluate survey feedback;
- Specify **who will review** and analyze survey results (i.e., a committee comprised of clients, staff, and board members); and
- Describe and assign consequences for any **staff retaliation** against clients based on feedback collected during the survey process.

**Budget**: Acknowledge and plan for the costs required to plan, design, distribute, and evaluate survey results. While surveys don't require significant staff resources to initiate, following an inclusive process takes time and resource investment. Potential costs include staff time, stipends for client participation, and the cost of acting on feedback collected from the surveys.

## Design

Surveys usually include three components:

1. An introduction;
2. Questions focused on the topic of the survey; and
3. Optional demographic information.

Surveys should focus on **actionable topics**. Gather information a program can act on. For example, initiate a survey to get feedback on a program's intake process.

See the Sample Client Satisfaction Survey in the Toolkit for examples of questions.

### Introduction

The introduction should be short and clear. It should provide the context for the survey and instructions on how to complete it. The introduction should explain that feedback will **not** impact a client's access to housing or services. The introduction can also include information about confidentiality, compensation, and accessibility.
Be sure to:

- Use introductory text with language that is welcoming;
- Ensure the introduction has clear directions on how to complete the survey; and
- Provide survey participants information about the purpose of the survey in short, precise language.

### Questions Focused on the Topic

Stay on topic for the survey. Only ask questions that will provide information that related to the topic of the survey. Narrow the set of questions to ensure people can complete the survey quickly, without doing any research. Surveys are typically 10 to 15 questions. The shorter the survey, the greater the likelihood that respondents will answer all questions.

**Readability** requires intentional choices around organization, sentence length, word choice, tone, and voice. Making surveys readable can improve accessibility. For more information about readability, please see the Accessibility & Readability Principles in the Toolkit for more information.

Providers may opt to have more than one survey. For example, programs could have one survey devoted to physical aspects of facility while a separate survey might focus on specifics of the supportive services program.

### Optional Demographic Information

Demographic questions can help programs identify differences in experience across groups. Demographic questions should always be optional.

Consider collecting optional demographic information about race, ethnicity, age, gender identity, sexual identity, and/or geographic location.

Other tips and tricks for surveys include:

| Tip | Instead of: | Use: |
|---|---|---|
| Be as concrete as possible. | Did you feel that your housing navigator kept you informed?<br>• Yes<br>• No | When you had important questions about housing, did you get answers you understood?<br>• Always<br>• Sometimes<br>• Rarely<br>• Never<br>• I am not sure |
| Use questions that anchor the experience in time. | When did you last talk to someone about your housing needs? | Have you talked to someone about your housing needs since January?<br>• Yes<br>• No<br>• I am not sure |
| Create anchors for participants along the way, e.g., ask questions in the order someone experienced the events. | Question 1: Were you satisfied with the intake process?<br>• Satisfied<br>• Neutral<br>• Not Satisfied<br>Question 2: Where did you go when you first became homeless?<br>• Multiple Choice Answers | Question 1: Where did you go when you first became homeless?<br>• Multiple Choice Answers<br>Question 2: Were you satisfied with the intake process?<br>• Satisfied<br>• Somewhat satisfied<br>• Neutral<br>• Somewhat dissatisfied<br>• Dissatisfied |
| Use language that is accessible to participants | Are you a person with a mobility disability? | Do you use a wheelchair or walker? |

### Recruit and Distribute

There are two steps to engage clients in feedback through surveys. Programs will need to:

- Recruit survey participants; and
- Distribute surveys.

## Recruit

It is important to identify the population the program would like to collect feedback from. This might be all program residents or a smaller percentage most deeply affected by the issue. For example, in developing a survey regarding childcare needs, a program might target households with children only.
Potential strategies to recruit respondents include:

- Provide talking points to staff and volunteers to encourage participation among clients;
- Make it easy to complete the survey in highly visited areas (e.g., leave copies of the survey in the dining room);
- Publicize the survey using brightly colored flyers;
- Announce the survey in meetings, newsletters, flyers, and through social media; and
- Encourage word-of-mouth recruitment among clients that participated in the planning or design process for the survey.

Whenever possible, focus recruitment on groups or individuals that have not participated in program surveys before. They may have invaluable insight into the program that has not been previously considered.

## Distribute

Survey responses should be collected in a way that protects client confidentiality and prioritizes comfort and safety. Consider the following survey distribution strategies:

- Surveys should be optional.
  - Completing the survey should not be a requirement for continued participation in the program or access to services.
  - Respondents should be encouraged to skip questions that make them uncomfortable.
- When needed, provide comfortable and private locations to complete the survey.
  - Consider asking staff to leave the area where clients will be completing the survey.
  - If clients need assistance with the survey, offer them the opportunity to use peer support (e.g., CAB members). Peer support workers should be compensated for their assistance with the survey process.
- Do not ask respondents to provide their name or other identifying information in the survey.

Surveys can be distributed in a variety of forms, including as a paper form and through websites. Some programs have begun testing new survey distribution methods through kiosks (e.g., Pulse for Good) or text message.

| Distribution | Benefits | Drawbacks |
|---|---|---|
| Paper Form | • Accessible for respondents with low technology literacy | • Surveys need to be collected individually and aggregated by hand. |

| | | |
|---|---|---|
| | and/or lack of access to a phone or computer<br>• Likely familiar for staff, volunteers, and respondents | • Legibility of handwriting |
| Online (e.g., Survey Monkey, Google Forms) | • Responses are immediately collected and aggregated.<br>• Survey can be distributed directly to clients via email.<br>• Many online platforms have automatic analysis capabilities. | • Programs may not have email contacts for clients.<br>• Clients may not have easy access to a phone or computer with internet capabilities.<br>• Some clients may have difficulty navigating unfamiliar websites. |
| Text Message-based survey (Survey Monkey (paid), see Lean Data Field Guide for options) | • Responses are immediately collected and aggregated.<br>• Survey can be distributed directly to clients via phone. | • Programs may not have telephone numbers for clients.<br>• Clients may not have easy access to a phone with text messaging capabilities.<br>• May require programs to pay a subscription fee. |
| Kiosks (e.g., Pulse for Good Kiosks) | • Responses are immediately collected and aggregated.<br>• High response rates<br>• Easily accessible for individuals with low literacy rates<br>• Can be placed in convenient locations where clients congregate (e.g., waiting rooms, lobbies) | • High up-front cost for the equipment<br>• Feedback capabilities are limited to questions that can be answered as multiple choice, as a scale, or ranking. Open-ended questions are not possible |

If the survey will be distributed electronically, consider offering paper copies of the survey as well. Providers can also host face-to-face sessions where they can help clients complete the survey (e.g., filling in responses for those that need help). The sessions should be publicized and may offer food (e.g., pizza) in addition to stipends. The sessions could include peer support with the survey (e.g., CAB members). Peer support could offer support with reading the questions and writing down the responses.

## Analysis

There are three main steps to the analysis process:

- Aggregate data findings;
- Analyze the results; and
- Develop a series of next steps based on the findings.

Pull together survey responses

Responses will be collected from each individual survey participant. While individual perspectives are important, it is also important to review the results across the entire set of people who took the survey. Pulling the information together in summary form to talk about the results across all survey takers will produce what is called "aggregate data."

Many online survey tools have the ability to analyze aggregate data and produce a report summarizing survey results. If the program has collected paper surveys, one or more persons will need to aggregate and analyze the data using the individual survey responses. The analysis should be short (no more than 2 to 4 pages) and include a summary of the feedback.

**Aggregate data** is a summary of all the combined individual pieces data. It can show patterns, commonalities in perspectives, and areas of disagreement amongst survey participants.

If the survey included opportunities for survey respondents to provide open-ended responses for some questions, staff should compile and analyze that feedback as well.

Analyze results

Identify a group of people who will be part of the survey analysis. Ensure that clients are part of the team, as they are well positioned to develop actionable next steps based on feedback received. Provide data that is aggregated before sharing with clients or staff, to ensure that identifying information of survey-takers is not available. Programs that already have a Resident Advisory Board can leverage members of that group to participate in the survey analysis.

The group should meet at least once to go over the data. During the meetings, they could discuss:

- How the organization will act or not act on the feedback; and
- How to bring the feedback and plan of action to the community, including board members, staff, clients, and partners.

## Follow Up

The results of the survey process can be the foundation for staff and community reflection. Feedback from survey participants can lead to change. Once the analysis is complete, consider whether to:

- Hold a communitywide meeting to share results;

- Wait to share results with the community until staff, volunteers, and clients have worked together to develop next steps;
- Develop talking points for staff, clients, and volunteers to share results; and/or
- Determine if staff and volunteers will share directly with clients during regularly scheduled one-on-ones and/or at meetings.

# Sample Client Satisfaction Survey

### Overview

Providers can improve the experience of their clients with lived experience of homelessness. One approach is to get their feedback regularly. Surveys are a way to get feedback from clients. Below is a sample satisfaction survey that can be customized to a provider's specific needs.

### Sample Resident Satisfaction Survey

Connections to Housing Satisfaction Survey for
[**Insert Organization**]

Instructions: Thank you for taking this survey! We look forward to your feedback.
All questions on this survey are optional. Filling out the survey will not affect your ability to receive help from [**insert organization**]. Your feedback will be confidential, meaning that your name will not be attached to the feedback. Your feedback will be shared with staff and volunteers at [**insert organization**] to improve our program.
If you would like support completing this survey, please reach out to [**insert staff name**] at [**insert staff email address**].

1. Since entering [**insert organization**], have you talked to someone about the help you need to get housing?
    a. Yes
    b. No
    c. I am not sure

2. When you had important questions about services or [**insert organization**], did you get answers you understood?
    a. Yes
    b. No
    c. I have not talked to someone about my needs yet.

3. Do you feel like you are making progress toward your housing goals?
    a. Yes
    b. No
    c. Maybe
    d. I do not have housing goals.

4. What additional resources would help you connect to housing?
    [Open-ended Response]

5. Overall, how has your experience been working with [**insert organization**] on connecting to housing?

**1** Poor | **2** Fair | **3** Neutral | **4** Good | **5** Excellent

The following questions are optional. They will help [**insert organization**] make sure we are collecting feedback from everyone equally.

6. When did you first become homeless?
    a. Less than 6 months ago
    b. Between 6 months and one year ago
    c. More than a year ago

7. What is your race or ethnicity? Please select all that apply.
    a. Arab/Middle Eastern
    b. Asian
    c. Black/African American
    d. Caucasian/White
    e. East Indian/South Asian
    f. Latino/a/e/x
    g. Native American/Indigenous
    h. Pacific Islander
    i. South/Central American
    j. Choose not to answer
    k. Other: ___________

8. What is your gender? Please select all that apply.
    a. Man
    b. Woman
    c. Choose not to answer
    d. Other: _____

Thank you! When you are done, **please return this survey to [location].**

## Example Survey Questions

In 2022, the California Department of Housing and Community Development (HCD) and Homebase collected feedback from Homekey residents. The following are examples of topics and questions used during surveys in that effort. Homekey sites could adapt these questions in future surveys.

### Building Quality

- How would you describe the overall quality of your building?
  - Poor Quality (1 out of 5 stars)
  - Fair Quality (2 out of 5 stars)
  - Moderate Quality (3 out of 5 stars)
  - Very Good Quality (4 out of 5 stars)
  - High Quality (5 out of 5 stars)

### Unit Quality

- How would you describe the overall quality of your unit (where you sleep)?
  - Poor Quality (1 out of 5 stars)
  - Fair Quality (2 out of 5 stars)
  - Moderate Quality (3 out of 5 stars)
  - Very Good Quality (4 out of 5 stars)
  - High Quality (5 out of 5 stars)
- How would you describe the size of your unit?
  - Too small
  - Right size
  - Too big

### Accessibility

- If you have a disability, does your unit meet your accessibility needs?
  - Yes
  - No (please explain)
  - I do not have a disability.

### Neighborhood and Location

- How would you describe the quality of the neighborhood?
  - Poor Quality (1 out of 5 stars)
  - Fair Quality (2 out of 5 stars)
  - Moderate Quality (3 out of 5 stars)
  - Very Good Quality (4 out of 5 stars)

    - High Quality (5 out of 5 stars)
- What is good about the location of this program?
    - [Open-ended Response]
- What is bad about the location of this program?
    - [Open-ended Response]

**Social Interactions**

- Describe your level of interaction with other residents in the program.
    - Not enough interaction.
    - The right amount of interaction.
    - Too much interaction.
    - N/A
- Describe your level of interaction with neighbors of the site.
    - Not enough interaction.
    - The right amount of interaction.
    - Too much interaction.
    - N/A
- Describe your level of interaction with loved ones off site.
    - Not enough interaction.
    - The right amount of interaction.
    - Too much interaction.
    - N/A
- What could be changed to better support the social interactions you want in your life?
    - [Open-ended Response]

**Sense of Safety**

- Please rate your agreement with the following statement: I feel safe at the Homekey site.
    - Strongly disagree
    - Disagree
    - Neither
    - Agree
    - Strongly agree
- Please rate your agreement with the following statement: I know how to contact staff in case of an on-site emergency.
    - Strongly disagree
    - Disagree
    - Neither

- Agree
- Strongly agree

- Please rate your agreement with the following statement: I feel like safety is a staff priority at this program.
  - Strongly disagree
  - Disagree
  - Neither
  - Agree
  - Strongly agree
- Please rate your agreement with the following statement: I feel like residents are only asked to leave when they violate rules related to safety.
  - Strongly disagree
  - Disagree
  - Neither
  - Agree
  - Strongly agree
- Is there anything that could help you feel safer at this Homekey site? Please describe.
  - [Open-ended Response]

**Pests**

- Have you had any challenges with pests in your unit?
  - Yes
  - No
  - I am not sure.
- Do you know who to contact when you have an issue with pests?
  - Yes
  - No
  - I am not sure.

**Access to Housing [Interim Sites Only]**

- Within the past month, have you spoken to staff about your permanent housing options?
  - Yes
  - No
  - I am not sure.
- What resources would help you access permanent housing?
  - [Open-ended Response]

# Guide for Planning a Client Focus Group

## Overview

One of the ways to get feedback from people with lived experience of homelessness is a focus group. For an effective focus group, it is essential to plan ahead. This guide covers the key elements to plan a successful focus group.

## Benefits of Focus Groups

A focus group is a group interview with a facilitator. Focus groups usually provide more detailed feedback than a survey. They provide less detailed feedback than a one-on-one interview. Focus groups are a good opportunity to gather feedback from several people at once.

Focus groups are best to:

- Explore what is important to the focus group members;
- Identify what is working and what is not working;
- Provide an opportunity for people to hear from each other;
- Gain insight on how the group perceives something; and
- Check in with the group about other feedback (i.e., feedback from surveys, interviews, etc.).

## Planning

It is best to plan for a client focus group. Plans should include logistics and development of a question guide.

Clients can be important partners in the planning process. They can assist to:

- Identify where to host the focus group;
- Recommend timing for the focus group;
- Recruit focus group participants; and
- Ensure the vocabulary used in the question guide matches the terms they use.

## Logistics

When convening a focus group, logistics will be important. The location, time of day, number of people attending, the length of a focus group, and who participates are all important.

## Location, Time, and Duration

Plan for a focus group **duration** that will allow good conversation. Typically, 1.5 hours is ideal.

Consider the needs of focus group participants when identifying the best **timing** for a focus group. Consider the circumstances of those who will participate:

- Do they go to work or school during the day or evening?
- When do they have access to childcare? Will there be childcare onsite during the focus group?
- Do they have to plan around school pick-up or mealtimes?
- Will it be helpful to offer more than one option at varied times during the day?
- Will the meeting date or time conflict with any requirements of the program (e.g., check-in times)?
- Will participants have to travel to participate in the focus group?

Ensure that the focus group **location** meets minimum requirements to allow a wide variety of clients to participate:

- Host the focus group in a **private, closed location** that is **familiar and accessible to focus group participants** (e.g., the community room at the project; in the day center, etc.).
- Provide **accommodations** for individuals with disabilities, including individuals with mobility challenges or hearing-or vision-impaired.
    - For example: Meet with a hearing-impaired client in advance of the focus group to ask what they need to participate. Clients may request a print out of the focus group questions or the assistance of a sign language interpreter, for example.

## Participants

The ideal size for an in-person focus group is approximately 6 to 8 people. That size allows space for each participant to share their experiences. If the focus group is virtual, fewer people (e.g., 4 to 6 participants) is ideal.

Ensure that there is adequate representation of different identities in the focus group to **avoid tokenism**. Consider the following questions when identifying participants:

- What is the **racial and ethnic breakdown** of the clients in the program?
- Are there clients **who have reported challenges** with this topic area in the past?
- How can the provider **reduce barriers to access** for clients?

> When convening a focus group, it is important to intentionally recruit participants. Recruitment can include (1) flyers and handouts, (2) word-of-mouth, (3) announcements at onsite meetings, (4) outreach via the mail, and (5) recruitment led by a Client Advisory Board.

    - For example, provide childcare, offer a meal, host the group in a wheelchair accessible room, provide a bus pass for people who need to travel to the site, knock on clients' doors when the focus group is about to begin.
- How can the focus group be accessible to clients who speak **languages other than English**?
    - Can the provider translate the written materials?
    - Can the provider offer an interpreter during the focus group?
    - Should the provider host a focus group entirely in a language other than English?

### Stipend

Programs can offer clients stipends to compensate them for the valuable skills and experience they bring to the feedback process. Focus group participants are typically provided a stipend of **$20 to $25 per hour**. In-person focus groups should offer a **snack or meal** as an additional incentive for participants.

The stipend can be distributed in a variety of ways (e.g., gift cards, check). If possible, consider giving participants an option between multiple modes of distribution. Please see Compensating Clients for Their Time: Stipends from the Toolkit for more detailed information.

## Content of the Focus Group

Once the logistics are decided, finalize the purpose of the focus group. Determine whether it is exploratory (e.g., broad topics, "How can the system of care be improved?") or more structured (e.g., seeking insight on a specific topic, "When you work with the housing team, were you treated with respect?").

### Develop Questions

Focus group questions are prepared in advance to ensure all topics of interest are covered. Preparing questions in advance also allows focus group facilitators to ask the same questions to each focus group.

One of the best ways to collect focus group questions is in a Question Guide. Please see the Sample Focus Group Question Guide in the Toolkit for question examples. A facilitator can use the Question Guide to lead a focus group and get feedback. Individuals with lived experience and/or program clients should help develop the Question Guide.

> Question Guides, are just "guides." They do not need to be followed exactly to be effective. A facilitator can adapt questions during the focus group to be responsive to the participants.

### Tips for Developing Effective Questions

Focus group questions should provide insights that cannot be gleaned from a survey or an interview. Here are tips for developing effective focus group questions:

| Tip | Instead of: | Use: |
|---|---|---|
| Use open-ended questions. | Are you happy with your housing? | How has your housing met your needs?<br>In what ways has your housing not met your needs? |
| Be as concrete as possible. | Do you feel like your housing navigators keep you informed? | When you had questions, how did you feel about the answers you got from the housing navigators? |
| Avoid leading questions. | Do you think that providers have your best interests in mind? | How have providers treated you? |
| Anchor the experience in time. | When did you last talk to someone about your housing needs? | Start Closed: Have you talked to someone about your housing needs since January?<br>Open Up: What happened during that conversation? |
| | 1st Question: How was the assessment?<br>2nd Question: Where did you go when you first became homeless? | Give questions in the order that someone experienced the events (e.g., begin with when they first became homelessness, then assessment, then housing search, then move-in) |
| Use language that is accessible to participants. | How did you feel about the VI-SPDAT? | Start Closed: Have you completed an assessment about your housing needs? Someone might have called it the VI-SPDAT or Coordinated Entry assessment?<br>Open Up: How did you feel during the assessment? |

## Flow

Develop a flow that will walk participants through a process that builds trust and comfort. Do not save the most important questions to the end in case time becomes an issue.

- **Begin** with questions that help participants become more comfortable speaking. Try to underscore the common characteristics of participants. Highlight participants' expertise on the topic.
- **Middle** questions can focus on issues directly relevant to the overall purpose of the focus group.

- **Wrap-up** with questions that give participants space to reflect on / clarify / expand on previous comments. Wrap-up questions can summarize the key issues and give participants a chance to respond.

See the Sample Focus Group Question Guide from the Toolkit for more information.

### Staff and Roles

For a focus group, be clear about staff roles. Determine staff roles in advance of the focus group. Depending on the focus group size and structure, consider the following roles:

- **One facilitator.** They will ask questions and navigate the group dynamics to provide an opportunity for all participants to share feedback.
- **One note-taker**. They will take notes on the focus group. Decide in advance whether the note-taker should focus on quotes or paraphrase main ideas. It can also be helpful to record the focus group.
- **Technologist.** If the focus group is remote, assign a staff member to help facilitate the technological components (e.g., muting/unmuting participants, answering questions in the chat).

It is crucial to the success of a focus group to identify the right facilitator.

- A **peer facilitator** is a trained facilitator with lived experience of homelessness. A peer facilitator may have the ability to put participants at ease and ask probing questions based in their own lived experience. Their participation can improve the quality of focus group data.
- A **neutral party** could include staff or trained facilitators from another agency or technical assistance provider. It is easier for participants to share constructive criticism with a neutral party than with program staff.

Be mindful when allowing program or site operations staff to sit in on the focus group. Even the presence of quiet staff can discourage open sharing from participants. Participants might fear that their feedback will impact their access to housing, shelter, or services.

### Analysis

There are three main steps to the analysis process:

- Aggregate data findings;
- Analyze the results; and
- Develop a series of next steps based on the findings.

### Pull Together Focus Group Responses

Responses will be collected from each individual focus group participant. While individual perspectives are important, it is also important to review the results across the entire set of focus group participants. This can include different perspectives from the same focus group or perspectives from across multiple focus groups. Pulling the information together in summary form to talk about the results across all focus group participants will produce what is called "aggregate data."

> **Aggregate data** is a summary of all the combined individual pieces data. It can show patterns, commonalities in perspectives, and areas of disagreement amongst focus group participants.

Analyzing focus group data can be a time intensive process. Begin by collecting and organizing information collected during the focus group, which could include notes, transcripts, and recordings. Then, staff should review the information and look for patterns in feedback collected during the focus group(s). Review all of the focus group data by theme and identify any outlier experiences. Finally, aggregate the focus group data into a short (no more than 2 to 4 pages) analysis document. The document should include a summary of the feedback.

### Analyze Results

Identify a group of people who will be part of the focus group analysis. Ensure that clients are part of the team, as they are well positioned to develop actionable next steps based on feedback received. Provide data that is aggregated before sharing with clients or staff, to ensure that identifying information of focus group participants is not available. Programs that already have a Client Advisory Board can leverage members of that group to participate in the focus group analysis.
The group should meet at least once to go over the data. During the meetings, they could discuss:

- How the organization will act or not act on the feedback; and
- How to bring the feedback and plan of action to the community, including board members, staff, clients, and partners.

## Follow Up

The results of the focus group process can be the foundation for staff and community reflection. Feedback from focus group participants can lead to change. Once the analysis is complete, consider whether to:

- Hold a communitywide meeting to share results;
- Wait to share results with the community until staff, volunteers, and clients have worked together to develop next steps;
- Develop talking points for staff, clients, and volunteers to share results; and/or
- Determine if staff and volunteers will share directly with clients during regularly scheduled one-on-ones and/or at meetings.

# Sample Focus Group Question Guide

## Introduction Talking Points

**Introduce the Facilitation Team**

Example: My name is [**name**] and I will lead today's focus group. I'm joined by [**name**] who will be taking notes. This focus group will begin now and end at [**end time**].

**Offer Information About the Space [In-Person Only]**

Example: You may leave at any time. The bathrooms are [**location of the bathrooms**]. We also have a few snacks at [**location of snacks**]. You can grab those whenever you'd like.

**Explain the Purpose of the Focus Group**

Example: We are working on a plan to [**insert purpose or goals here**]. Your answers and comments will help us do that.

**Explain How the Information will be Used**

Example: We will use the information you give us along with other community feedback to improve the availability and quality of housing and services. Your point of view is very important to this process. We appreciate your time and feedback.

**Explain the Goals of the Focus Group**

Example: The goal today is to hear from everyone about your experiences with [**program name**].

- What is working well? What isn't?
- What are some ideas you can share to improve housing or services?

**Explain the Process of the Focus Group**

Some Examples:

- Sometimes we will ask everyone to answer the same question and sometimes we may have follow-up questions for the same person.

- If there is something that someone else says that you want to talk about, feel free to do so when you get a chance to speak.
- You do NOT have to answer anything you do not like.
- We do not need to agree about anything today, we want to hear your point of view and it might differ from that of others.
- Everyone has different experiences and ways of thinking about things. We do not all have to agree. Please be respectful of other people's experience and comments.
- We do not plan to use your names or specific story.
- We want to try and act on the feedback we hear today and recommendations you share.
- Participation in this focus group will not impact your ability to participate in this program. Please feel free to speak your mind. We are here to find out how to improve the program.

**Explain Stipends**

Example: We will provide you all with a gift card in appreciation of your time. The gift card will be for [**amount of gift card**]. Gift cards can be for [**list gift card types**].

**Provide an Opportunity for Clarifying Questions**

Example: "Any questions about what I've said?"

**Begin to Record and/or Take Notes**

Example: We will now begin to record or take notes on what folks are saying. We will not share your name when talking about what was said in this focus group. Instead, we will say the feedback comes from "a participant at [**program name**].

**Lead Introductions**

Example: Please introduce yourself. Tell us your name, how long you've been in the program, and [**light ice breaker question**].

A facilitator should be skilled at facilitation. They may want to prepare key phrases that can help re-direct the group if things go off topic and/or someone begins to dominate the conversation:

- Thank you for that feedback [**name**], does anyone else have anything to say on this topic?
- Thank you for that feedback! Keeping an eye on the time, I think it's time to move onto the next topic…
- Thanks for that feedback [**name**], did you have any additional thoughts on [**re-state question**]?
- We will certainly make a note of that, thank you. Does anyone else have something to say?
- I am hearing that there are challenges with [**re-state what the participant has shared**]. Does that cover it or is there more you'd like to say?

## Example Focus Group Questions

In 2022, the California Department of Housing and Community Development (HCD) and Homebase collected feedback from Homekey residents. The following are examples of topics and questions used during focus groups in that effort. Homekey sites could adapt these questions in future focus groups.

### Building Quality

- Tell us about the quality of the building.
    - What is good about the quality?
    - What could be improved?

### Unit Quality

- What is good about the quality of your unit?
- What could be improved about your unit?

### Accessibility

- What is it like for residents with disabilities to get around the building and units here?
    - In what ways could accessibility be improved in the building or in your unit?
    - Have you ever talked with staff about ways the building/unit could be more accessible? What have you been told?

### Neighborhood and Location

- How do you feel about the neighborhood where you live?
    - For those who have mixed feelings or issues with the neighborhood, what do you wish was different about the neighborhood?
- What conveniences do you wish were closer (e.g., grocery store, shopping, doctor's offices)?
- What kind of transportation do you have?
    - What do you need transportation for (e.g., rides to doctor's appointments, weekly trips to shops, something more frequent)?

### Social Interactions

- How do you feel about the level of interaction you have with loved ones who live off site?
    - What ideas would you recommend for improving this?

- How do you feel about the level of interaction you have with other program residents?
- What changes could help improve resident interaction?

**Sense of Safety**

- How safe do you feel at this site?
- For those that feel unsafe, what is the main cause?
  - Do you feel unsafe all the time? Just at night? Just during the day?
  - Do you have someone you can reach out to when you feel unsafe?
  - If you have a concern at night, who do you call?
  - What changes would make you feel safer?

**Pests**

- Have you had any challenges with pests in your unit?
  - If yes, did you report this to staff?
  - How did they respond?
  - Did you feel the response resolved the issue?
  - Do you know what might be the cause of the pest issue?

**Access to Housing [Interim Sites Only]**

- What barriers/challenges have you faced when trying to access services or get housing?
- What's needed in terms of housing?

**Permanent Housing Retention [Permanent Sites Only]**

- What helped you access housing?
- What has been helpful for keeping you in housing?
- What additional help do you need?
- What are the things that make it hard to get or keep housing?

## Wrap Up

**Signal that the Focus Group is Ending**
Example: Thank you to everyone for sharing today! We only have about 10 minutes left in this focus group.

**Summarize Key Discussion Points**
Example: During our conversation today, I've heard loud and clear [**3 main takeaways**].

**Give Participants Space to Reflect on or Clarify Previous Comments**
Example: “Does anyone have any last thoughts they’d like to share? Any clarification on any previous comments?”

**Share Next Steps**
Example: We will review all of your feedback and suggestions from today. [**Share about your data collection process and what you hope to do with the feedback. Share information about how participants can stay involved if they are interested.**].

**Distribute Gift Cards**
Example: Thank you again for your time. The feedback we heard today is invaluable. As a token of our appreciation, we will have the gift cards available for you at the front. As a reminder, we have gift cards to [**business names**] available. Please come forward and we can hand them out.

# Compensating Clients for their Time: Stipends[1]

## Overview

Programs can offer clients stipends to compensate them for the valuable insights and experience they bring to the feedback process. Stipends, however, can impact a participant's eligibility for many public benefit programs. For example, stipends are considered "income" and may impact eligibility for essential benefit programs. This document outlines different considerations when offering stipends to clients.

## Stipend Amounts

Stipends compensate clients for the time it takes them to provide feedback. They can come in many different forms: gift cards, electronic fund transfers (EFTs), and/or checks.

The following chart includes a range of stipend amounts for clients in California. The chart is a starting place to consider. The exact stipend amount will vary by community and activity.

| Activity | Stipend Recommendation Range |
|---|---|
| Focus Group | $20-$25/hour |
| Surveys[2] | Low: $20/hour or $10/survey<br>High: $25/hour or $15/survey |
| Client Advisory Boards | $20-$25/hour |

## Stipend Limitations

There are several limitations that are associated with compensation for clients experiencing homelessness. These include:

- Tax reporting thresholds
- Implications on public benefit eligibility

### Tax Reporting Thresholds

[1] The content in this fact sheet is provided for informational purposes only and does not constitute legal advice. Homebase does not enter into attorney-client relationships.
[2] Surveys that take longer than one hour to complete should use the hourly rate.

If the total amount of stipends to a client are equal to or exceed $600 in one calendar year, their income must be reported to the IRS. Please note:

- Participants who receive more than $599 in a calendar year will need to **complete a W-9 IRS form**;
- The provider will have to **file a 1099** for each person who received $600 or more during a calendar year; and
- Providers will not take **taxes** out of a stipend when it is issued.

If a client does not want to complete a W-9, they should not request more than $599 in stipend payments per year.

The requirement to report stipends may have tax implications for clients. The stipend could:

- Affect a household's tax returns;
- Impact requirements to provide work eligibility documentation; or
- Result in potential wage garnishment.

## Public Benefit Program Eligibility

Stipends can impact clients' eligibility for important benefit programs used for housing, food, and other household needs. In many public benefit programs, stipends and other forms of compensation are counted as "income" for the months they are received. Even stipends provided through gift cards are considered income. Stipends can be considered income, even if awarded in an amount less than $599.

Even if the stipend doesn't impact income eligibility, it may impact the amount someone is allowed to have as an asset. Assets include money in a bank or other savings.

The rules are different in each of the programs. Each program has different rules for:

- What is considered income or assets;
- How often payments are received and counted; and
- When a payment is counted.

Each client receives a different set of benefits. The different program rules and the different benefits each client receives make it difficult to develop a general policy for stipends.

Given the nuances of benefits, organizations should consider whether stipends may negatively impact clients. Providers should provide clients with information about their stipend options and the potential impacts on benefits.

The topic of compensation should occur as part of the initial conversation before a client decides to provide feedback. They will need to understand the potential impact of whether or how to receive a stipend.

Income and asset rules also change in programs. It is important to regularly review the topic of stipends with clients to ensure the organization's approach to stipends works for everyone.

> In both CalFresh and CalWORKs, most stipends count as available income when they recur and can are anticipated to be received regularly (e.g., every month or every other month). For these two programs, a stipend could result in a decrease to someone's benefits.
>
> For Supplemental Security Income (SSI), gift cards or certificates count as income if they can be (1) used to purchase food or shelter, and (2) resold. See 20 CFR § 416.1121(f) for more information.
>
> Other programs where stipends might impact eligibility include CoC-funded rent calculations, Covered California, and Medi-Cal (Medicaid), among others.

Providers may find it beneficial to have an eligibility specialist available for consultation. They can help clients make decisions about how to receive their stipend, whether to participate without compensation, or whether or not to receive stipends at all.

# Accessibility & Readability Principles

## Overview

To ensure all clients can participate in feedback efforts, it is important to ensure readability and accessibility in written materials. **Readability** is a measure of how easy a text is to read. **Accessibility** refers to principles that ensure individuals with disabilities or barriers to access (e.g., lack of internet) can access and understand materials.

This document provides basic guidance for improving readability and accessibility in written materials.

## Design Principles: Accessibility

When writing for clients experiencing homelessness, adopt **design principles** that are ensure the material is accessible to all types of readers. Suggestions to make written material more accessible use:

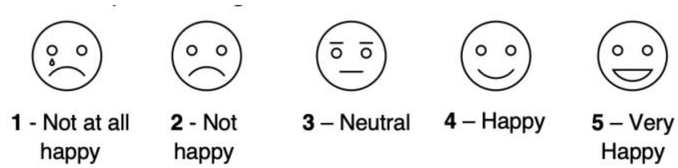
- Introductory text with language that is welcoming;
- Clear directions;
- More white space and wide margins;
- Titles and short headings to organize information;
- Bullet lists to break up blocks of information;
- Check boxes or questions and answers (Q&A) to engage readers;
- At least 12-point font;
- Sans serif or serif fonts;
- Graphics and photographs; and
- Text that addresses the needs of all different kinds of clients who might be surveyed.
    - For example, don't presume people have a home address when asking a question.

In addition, provide options for clients with Limited English Proficiency (LEP) and visually impaired users, such as surveys in other languages or screen readers. Make sure you offer information about alternative ways to complete, read, or view information. For example, offering both printed and electronic versions of surveys.

If writing questions (for example, in a survey), design questions that respondents can answer from their personal experience and perspective. Use a mix of scale, multiple-choice, and select-all questions to keep respondents engaged.

Consider integrating analog scales or other visual devices into your survey.

- On a scale from 1-5, how happy are you with the food at [**organization name**]?



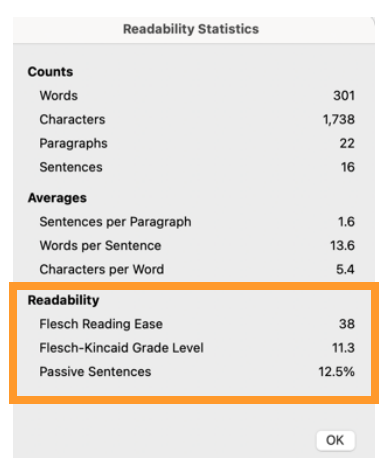

## Design Principles: Readability

The average American adult reads between the 7th - 9th grade level. Most adults read 3 grade levels below the highest grade they completed. Readability requires intentional choices around organization, sentence length, word choice, tone, and voice. Making materials readable can improve accessibility.
There are ways to edit to a grade level that will create the best environment for clients to read and understand information:

- Avoid words that are longer than 10 letters;
- Use sentences with 15 words or less;
- Avoid using passive voice (e.g., “they were called by Julie” v. “Julie called them”);
- Do not use compound sentences (e.g., sentences that use “for,” “and,” “but,” “or” and “so”);
- Use short, familiar words (unhoused v. people experiencing homelessness); and
- Edit your work to make your point clear and concise.

There are many free tools available that can test text to see what grade level it is written for. For readability resources, see:

- Readable.com
- Hemingway App
- WebFX




Tool Example: Microsoft Word recently introduced document statistics that score readability for a document. Under “Review” then “Spelling and Grammar” the editor function allows a writer to get click on “Insights/document stats” to see what the readability grade level is.

# Sample Anti-Retaliation Policy

## Overview

Clients should not be penalized for providing honest feedback to programs. One way to encourage feelings of safety is to create an anti-retaliation policy. The following language could be incorporated into a provider’s policies and procedures.

## Sample Policy

[**Provider Name**] values honest and transparent feedback from all residents. [**Provider Name**] values a safe space where residents can provide feedback without risk of retaliation from the program, staff, the board, landlords, or volunteers. [**Provider Name**] will not allow retaliation from staff against residents related to any feedback received about the program.

Retaliation includes, but is not limited to:

- Harassment;
- Intimidation;
- Violence;
- Program dismissal;
- Refusing to provide services;
- Use of profane or derogatory language to or in reference to the resident;
- Breach of contract;
- Increasing the rent;
- Claiming there was a non-payment of rent;
- Claiming there was no security deposit;
- Ending a month-to-month tenancy or refusing to renew a lease;
- Starting an eviction lawsuit if a tenant decides to stay and fight in court; and
- Petty inconveniences like removing laundry facilities, or canceling cable access

[**Provider Name**] will take immediate steps to stop retaliation and prevent its recurrence. The steps will include, but are not limited to:

- Corrective action to mitigate harms done to client (e.g., re-instate in program, reduce rent to original amount);
- Verbal or written warning for entities involved in retaliation;
- Creation of an improvement plan for offending entities; and/or
- Development of internal policies to better protect client confidentiality in feedback processes.

The [**person responsible for processing grievances**] will request supporting documentation from the alleged victim of retaliation to substantiate all claims.