



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:

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;
- 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.

## 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.























### 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.	<p>Did you feel that your housing navigator kept you informed?</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	<p>When you had important questions about housing, did you get answers you understood?</p> <ul style="list-style-type: none"> <li>• Always</li> <li>• Sometimes</li> <li>• Rarely</li> <li>• Never</li> <li>• I am not sure</li> </ul>
Use questions that anchor the experience in time.	<p>When did you last talk to someone about your housing needs?</p>	<p>Have you talked to someone about your housing needs since January?</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> <li>• I am not sure</li> </ul>
Create anchors for participants along the way, e.g., ask questions in the order someone experienced the events.	<p>Question 1: Were you satisfied with the intake process?</p> <ul style="list-style-type: none"> <li>• Satisfied</li> <li>• Neutral</li> <li>• Not Satisfied</li> </ul> <p>Question 2: Where did you go when you first became homeless?</p> <ul style="list-style-type: none"> <li>• Multiple Choice Answers</li> </ul>	<p>Question 1: Where did you go when you first became homeless?</p> <ul style="list-style-type: none"> <li>• Multiple Choice Answers</li> </ul> <p>Question 2: Were you satisfied with the intake process?</p> <ul style="list-style-type: none"> <li>• Satisfied</li> <li>• Somewhat satisfied</li> <li>• Neutral</li> <li>• Somewhat dissatisfied</li> <li>• Dissatisfied</li> </ul>
Use language that is accessible to participants	<p>Are you a person with a mobility disability?</p>	<p>Do you use a wheelchair or walker?</p>

**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.

<b>Distribution</b>	<b>Benefits</b>	<b>Drawbacks</b>
Paper Form	<ul style="list-style-type: none"><li>• Accessible for respondents with low technology literacy</li></ul>	<ul style="list-style-type: none"><li>• Surveys need to be collected individually and aggregated by hand.</li></ul>

	<p>and/or lack of access to a phone or computer</p> <ul style="list-style-type: none"> <li>Likely familiar for staff, volunteers, and respondents</li> </ul>	<ul style="list-style-type: none"> <li>Legibility of handwriting</li> </ul>
<p>Online (e.g., <a href="#">Survey Monkey</a>, <a href="#">Google Forms</a>)</p>	<ul style="list-style-type: none"> <li>Responses are immediately collected and aggregated.</li> <li>Survey can be distributed directly to clients via email.</li> <li>Many online platforms have automatic analysis capabilities.</li> </ul>	<ul style="list-style-type: none"> <li>Programs may not have email contacts for clients.</li> <li>Clients may not have easy access to a phone or computer with internet capabilities.</li> <li>Some clients may have difficulty navigating unfamiliar websites.</li> </ul>
<p>Text Message-based survey (<a href="#">Survey Monkey (paid)</a>, see <a href="#">Lean Data Field Guide</a> for options)</p>	<ul style="list-style-type: none"> <li>Responses are immediately collected and aggregated.</li> <li>Survey can be distributed directly to clients via phone.</li> </ul>	<ul style="list-style-type: none"> <li>Programs may not have telephone numbers for clients.</li> <li>Clients may not have easy access to a phone with text messaging capabilities.</li> <li>May require programs to pay a subscription fee.</li> </ul>
<p>Kiosks (e.g., <a href="#">Pulse for Good Kiosks</a>)</p>	<ul style="list-style-type: none"> <li>Responses are immediately collected and aggregated.</li> <li>High response rates</li> <li>Easily accessible for individuals with low literacy rates</li> <li>Can be placed in convenient locations where clients congregate (e.g., waiting rooms, lobbies)</li> </ul>	<ul style="list-style-type: none"> <li>High up-front cost for the equipment</li> <li>Feedback capabilities are limited to questions that can be answered as multiple choice, as a scale, or ranking. Open-ended questions are not possible</li> </ul>

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:

<b>Tip</b>	<b>Instead of:</b>	<b>Use:</b>
Use open-ended questions.	Are you happy with your housing?	How has your housing met your needs? 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?	<u>Start Closed</u> : Have you talked to someone about your housing needs since January? <u>Open Up</u> : What happened during that conversation?
	<u>1<sup>st</sup> Question</u> : How was the assessment? <u>2<sup>nd</sup> Question</u> : 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 homeless, then assessment, then housing search, then move-in)
Use language that is accessible to participants.	How did you feel about the VI-SPDAT?	<u>Start Closed</u> : Have you completed an assessment about your housing needs? Someone might have called it the VI-SPDAT or Coordinated Entry assessment? <u>Open Up</u> : 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.”

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.

**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.

### 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<sup>1</sup>

## 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 <sup>2</sup>	Low: \$20/hour or \$10/survey 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](#)

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<sup>1</sup> 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.

<sup>2</sup> 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.

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.

In both CalFresh and CalWORKs, most stipends count as available income when they recur and can be 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.

# 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 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]**?




1 - Not at all happy




2 - Not happy



3 - Neutral



4 - Happy



5 - Very Happy

### 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](https://readable.com)
- [Hemingway App](#)
- [WebFX](#)

Readability Statistics	
<b>Counts</b>	
Words	301
Characters	1,738
Paragraphs	22
Sentences	16
<b>Averages</b>	
Sentences per Paragraph	1.6
Words per Sentence	13.6
Characters per Word	5.4
<b>Readability</b>	
Flesch Reading Ease	38
Flesch-Kincaid Grade Level	11.3
Passive Sentences	12.5%
OK	

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.