Client Feedback Fundamentals
March 11, 2026

Allison Bostrom (AB): Hi, everyone. Welcome to Client Feedback Fundamentals. My name is Alison Bostrom. I'm the Program Manager for Monitoring and Evaluation at Switchboard, and I'm going to be leading today's webinar. We'll start off with our learning objectives for today. By the end of this session, you will be able to explain why collecting and using client feedback data is essential for effective services, compare feedback collection approaches, including two-way communication strategies, and identify ways to use client feedback to improve services and close the feedback loop.

We're actually going to start today with a couple of Slido questions to ask about your own experience, potentially giving feedback. Starting with, thinking about the last time you were genuinely impressed with a service, what did you do, if anything? We'll give everyone a moment to start responding to this.

AB: Positive Google review, awesome. Great, and also told some friends, told them directly, I love that. Completing a survey, if they offer one. Great. Directly or online, both good options. Five stars. Nice. Great. Told family, direct feedback, emailing afterward. Bought them a coffee, I love that. Leaving a tip, referring people. Seeing a lot of similar responses here, which is great. Constructive feedback. Recommendation. Awesome. Fantastic. Thanks for sharing that, everyone. It seems like we've got some common themes coming up here, which Slido has nicely summarized for us at the top.

Leaving positive reviews, giving feedback either directly or later on via a survey, and referring friends or family. These are all great ways to show appreciation for a service. We're going to now think about the opposite and think about the last time that you were very unhappy with a service. What did you do in that case, if anything?

Yes, you can do a lot of the same things, leaving a review, telling other people, changing service providers, submitting a survey response, stop using that service. Absolutely. Good. Aww, cried. Ask for a manager. Sure. File a complaint, depending on the issue. Absolutely. Trying to find a resolution. That's great. Depending on what the issue is, that can be really helpful. Leaving suggestions for improvement. Awesome. Thank you, everyone. That is great. I want you to keep these things in mind as we talk about collecting our own feedback today, because it can be useful, I think, to put yourself in your clients' shoes.

Why Collect Client Feedback?
AB: We're going to start by exploring the reasons that collecting feedback from clients is important. First of all, what is client feedback? It's any information clients share about their experiences with your organization or programming. Collecting and acting on feedback is an important means of empowering clients to help shape your programming. There are a few important benefits to collecting client feedback. The first is that being able to share feedback can be empowering for clients as they have the opportunity to share their thoughts and insights.

It also builds trust by signaling that you value their ideas and care about their experience with your programming. Client feedback can be an important way of measuring your programming's results and quality by helping you understand how it was received by your clients. Sometimes, feedback data is required by funders, so this can also be a compliance exercise. Then, finally, when done properly, client feedback collection can help you to improve the services you provide. I know that a lot of you were interested in this. I saw that in your registration, so thank you for that.

We've got another Slido for you now to ask where you're currently at. If at all, how are you currently collecting client feedback in your project or projects? Surveys, very popular option. Google Survey, absolutely. Focus groups, I love that. Verbal feedback, awesome. Surveys and interviews, client feedback sessions, I love that. Grievance forums, direct calls, pre-and post-assessments, home visits, conversations, this is great. Lots of different ways. Closeout meeting, I love that. Zoom surveys, yes, for sure. Live direct calls, that's great to see.

Awesome. I think you guys have a little bit of a preview of some of the stuff we'll be talking about, but it's great to hear that you're already thinking about this. I love seeing pre-and post-assessments in here as well. Now we have a follow-up question, which is about following up. Do you typically follow up with clients after they provide feedback? I wanted to give you more than just a yes, no here, because I know sometimes the answer is, "Yes, when we can." Seeing a good mix here.

AB: All right. Give it a few more seconds in case anyone else wants to weigh in, but we're seeing that most commonly it's a yes sometimes, which is fair. Awesome. Great. Something else we're going to touch on in this webinar is not only the importance of following up, but maybe some considerations for how and when to do so. Thank you all for sharing your experience. We'll talk a little bit about the actual process of collecting client feedback. Regardless of your starting point, hopefully today you'll walk away with a new idea you can try to improve your practice.

Let's start by understanding the overall process of collecting and using client feedback. The client feedback loop is circular, hence why we call it a loop, representing a continuous improvement process. It starts with gathering feedback, as you may have guessed, which is what we do when we reach out to clients to learn more about their experiences with our programming. Then once you collect the data, you'll need to analyze it to identify key trends, noting what went well and where there's room for improvement. Based on this analysis, you can decide on action items. This can include both things you plan to keep the same in the future and changes you'll make based on elements of your programming that clients felt could use improvement.

Next, it's very important to make a clear plan for implementing these action items, including a timeline and a mapping of who's responsible for what. Depending on where you are in your project, you might make adjustments in the middle of implementation or build improvements into the next cycle of this project or other future projects. Then, finally, the last step is to close the loop. This involves following up with clients to thank them for their input, summarize what you learned from the data, and explain clearly how you'll act on the data. We'll talk more about this in the final section of today's webinar.

AB: Next, though, we'll cover some key considerations and basic principles to keep in mind as you collect client feedback data. One key principle is to only collect data you need and can use. To help you adhere to this, first consider each piece of data you plan to collect and ask yourself if it's useful for your project. This might seem obvious, but it's easy to get carried away and plan to collect more data than you really need. Then, for any data that does seem useful, make a clear plan for how you'll use it. Think carefully about how you might be able to act on the data.

If you can make a clear plan, then include this data in your data collection plan. Otherwise, rethink whether the data is really useful for you. Being thoughtful about what data you collect is important for creating efficient systems, but it's also a way of respecting your client's time. Another crucial element of any data collection activity with clients is obtaining meaningful informed consent. Meaningful here indicates that clients genuinely understand what data you're collecting and why, and that clients are aware of their rights and any potential risks in sharing their data.

To obtain meaningful informed consent, you should carefully explain the purpose of data collection in language your clients understand. Allow time for them to ask clarifying questions and confirm with them that their questions have been fully answered. Then explain how the data will be used. For example, you might say, "We are collecting information about your experience with our job readiness training workshops. We will carefully review all of the feedback shared by our clients and use this information to improve our services in the future. Understanding which parts of the workshop you found helpful or challenging will be very useful for us as we plan future projects, and we value your input."

AB: It doesn't have to be that wordy, but the idea is that clients should understand why you're asking them these questions and how that information will be used. Then clearly outline clients' rights. For example, clients should understand that participation is voluntary, and they can withdraw at any time. They should know that their choice of whether to participate and the type of feedback they share won't impact their eligibility for services or the way they're treated as a client of your organization. Explain to your clients how data will be stored and protected, and make sure that they understand the process for requesting the erasure of their data if applicable.

You should also inform clients about whether their responses will be anonymous, so completely separate from their identifying information, or confidential, which means that it may be tied to their identifying information but protected so only the data team can see this. An example of this would be if you did an interview with a client. You would know who they were, but you could separate their name from their responses when you're storing the data elsewhere, for example, and make sure that only people who need to know that have access to it.

Again, make sure that clients are able to ask questions about this. If you sense they don't fully understand what you share, it's okay to ask your own questions, such as, "To make sure I've explained this properly, can you tell me what you would do if you no longer wanted to participate?" This is a really good way to gauge whether the consent is actually informed. Then, finally, consider the barriers that clients may encounter to fully understanding and consenting to data collection. Make sure the explanatory materials are available in the languages your clients speak, and if any of them have literacy barriers, have a native or fluent speaker available to verbally explain the information.

AB: Carefully document that the client has provided consent verbally once you confirm that they've understood the information presented. All this falls under client protection. Then, once you have clients' data in your possession, you have a responsibility to keep it secure. This includes both physically and electronically securing the data. Now that most data collection is digital, we may not think about physically securing data very much, but you still have paper forms, perhaps, including consent forms or surveys. If not, you have physical devices like phones, tablets, and computers that you use to access data.

Client data can be compromised if any of these devices are accessed by the wrong people. A few key considerations for physically securing data include keeping work devices in the office whenever possible, preferably locked in a drawer or filing cabinet when not in use, and doing the same for any paper copies of data or consent forms. Then, when using work devices outside of the office, safeguard them by keeping them on your person or locked in, for example, a cabinet of your home office. On the other hand, to electronically secure your data, consider the following.

One, preventing unauthorized access by password-protecting spreadsheets, data systems, survey accounts, et cetera, and when possible, setting permissions so that only staff who need access can view the data. Likewise, use strong passwords to protect any devices you use to access client data and don't share these passwords. This is common advice. Especially when working outside the office, consider adjusting device settings so a password is required anytime the device goes to sleep. This can be frustrating as the primary user, but it's an important security feature.

AB: Then use a secure internet connection when accessing client data. Public networks, especially those without password protection, maybe at your local coffee shop, are more vulnerable to breaches and could lead to unauthorized access. Then, finally, consider two general principles to minimize data protection risks. The first of which is to only collect what you truly need. We mentioned this already in the name of efficiency, but it's also important for minimizing the amount of data that could potentially be compromised in the first place. Then, to either anonymize or pseudonymize sensitive information when possible.

This means separating clients' personal identifying information, like their name, address, phone number, date of birth, from their responses. Next up, we have a little Slido before we head into the next section. I'd love to hear from you. Based on what we discussed in this section, what is one benefit of collecting and using client feedback data that might inspire you to implement these practices moving forward?

Handling concerns and improving programs. Absolutely. Developing programs to meet client needs, for sure. Building trust. I love that. Ensuring satisfaction, improving services. Absolutely. Addressing pending needs. Building trust. Improving implementation and trust. I love hearing trust. Finding weak spots in programming. Satisfaction, trust, and security. Relevant and useful. Catching gaps. Connecting to the purpose. I love that. Excellent. Addressing concerns. Sharing positive feedback, too. That's so important. I love it.

That's a good way to get your staff on board with whatever activities you're doing is to remind them that they can hear some good things, too.

Excellent. Improving services. Ensuring satisfaction. Seeing a lot of excellent motivations. I know sometimes when you're a little bit overloaded, it can feel like data work is just another thing, but it's good to remember why we would do this in the first place. Streamlining processes. That's great, too. That could also be a benefit for the staff. Fantastic. Thank you all so much for sharing.

2. Approaches to Feedback Data Collection

AB: We're going to move now into our second section, and we're going to talk about the methods that you can use to collect feedback data. A key concept to keep in mind when planning feedback collection is that some feedback is always better than none. I know I saw that a few of you in your registration mentioned time constraints and capacity constraints, and that's completely fair. Keep this in mind as you're thinking about planning feedback processes. If you're only able to manage small data collection projects, that's okay. Your main goal should be to collect some amount of data that you can actually use. Rather than collecting a large amount. Here, we'll outline a few common feedback collection tools arranged roughly from least to most resource intensive. Just keep in mind that this can vary a lot depending on your exact circumstances.

The feedback collection tools we'll cover in this section include suggestion boxes, client feedback surveys, which I know a lot of you mentioned already, interviews, workshops and town halls and focus group discussions. Let's start with some of these lower-resource tools. First of all, we have suggestion boxes, which are open feedback channels people can use to submit their thoughts. These can be physical boxes with sheets of paper and pencils available, or anonymous online or phone options that people can use at their convenience. It's important to keep in mind when you have a physical box to try to secure that in some way, just like you would secure any other physical data.

Then we have surveys. I think a lot of you, based on your Slido responses, are familiar. These are structured questionnaires involving multiple choice, ranking, rating, or other types of questions. They might also include open-ended questions. Depending on the questions asked, surveys can take different amounts of effort to analyze. They can be administered online, on paper, or over the phone. For paper or phone surveys, you might use what's called an enumerator to read the questions to people and record their answers. It takes more time and money to train and compensate enumerators, but they allow you to administer surveys to people with literacy barriers, which can be really nice.

AB: Then, looking at some of the more high-resource tools, we have interviews, which are simply one-on-one conversations aimed at understanding an individual's perspective or experiences, typically guided by a set of questions. Then we have workshops and town halls, which are an open forum style of meeting, either in person or virtual, in which a large number of people are invited to share their thoughts.

Then, finally, we have focus group discussions, which are small group conversations also typically guided by a set of questions. They try to capitalize on the interactions between participants. Sometimes people will share ideas that spark thoughts in others, and so that's an advantage of focus groups over interviews. There's also disadvantages, but that's one advantage when you have multiple people in a room. That being said, all of these tools require careful consideration of participants' comfort levels speaking in front of others. For example, if you're running a focus group discussion with a mix of youths and elders from a community in which elders are considered the final authority, the youths may not feel comfortable voicing their opinions if they contradict those of the elders.

AB: Observing group dynamics can be interesting and informative in the group options presented here. If participants feel comfortable, they might even inspire additional ideas in each other, like I mentioned. Think carefully about who you're grouping and why. That goes for interviewers, too. Think about who clients will feel comfortable speaking with. Then, if you have the capacity, you might consider incorporating client voice at the beginning of your project cycle, too. While feedback is collected during and at the end of the project, the approaches shown on this slide here are useful for bringing client input into your project design more directly.

First up, we have needs assessments, which are exactly what they sound like. They're projects that seek to understand newcomers' needs and priorities. You might use one or more data collection tools, such as surveys and focus group discussions, to collect this information. Needs assessments can be as broad or as narrow as you'd like, though you should always make sure you're collecting information you're able to use. It's common to narrow the focus to a particular area, such as the needs of families with young children or employment needs, to help focus your project.

Next up, we have client advisory councils, which are typically comprised of a group of individuals from the communities you serve who have lived experience as newcomers.

Advisory councils are a great source of information and advice informed by lived experience, though keep in mind that a few influential members of the community may not speak for everyone. Then, finally, there's a family of methods that fall under the umbrella of participatory design approaches. These are methods that involve clients directly in the project design process.

AB: They range from consultations, such as the client advisory councils we mentioned, to full ownership, in which clients steer the direction of a project and staff support its implementation. While feedback on past projects may surface during the data collection process in any of these approaches, their primary aim is not really to gather feedback. Rather, these approaches aim to gather ideas, priorities, and perspectives that can help inform programming from the beginning. They can be a nice complement to feedback data collection.

If we turn our attention back to feedback collection methods, which of the mentioned approaches do you think you might be able to use in your work?

You can also mention anything you're already using, because I know some of you are. Surveys? Yes. Suggestion boxes. Great. Interviews and focus groups as well. Awesome. Okay. We've got all of them. Wonderful. I know we've got a big group on here, so I'll give people a few more seconds to weigh in. I'm not surprised to see surveys are out ahead, though. These are very popular usually. Yes, a good number of interviews and focus groups and suggestion boxes as well. Some workshops and town halls. That's great. Fantastic. Awesome. Thank you all so much for sharing your experiences.

AB: We're going to get to our first case study now. I'm going to read it out, but if that's difficult for you or you want to refer to it, please refer to the chat where everything I'm going to say is right there. Abiyot is a family services supervisor at a local social services agency. He is managing a project to help newcomer parents navigate raising children in a new country. The project includes workshops and discussions about specific challenges as well as guest speakers. Now the project is coming to a close, and Abiyot is starting to work on the next project cycle, and he wants to incorporate feedback from the clients who have already participated.

He wants to learn what worked well for his clients, including what was most helpful, relevant, and accessible. He also wants to know what didn't work and why. As Abiyot begins to think about which feedback mechanism would be best, he keeps in mind these considerations. First, his team has limited capacity due to many competing demands on their time. Next, his clients speak several different languages, and many of them are preliterate. I want you to keep those considerations in mind as you answer this Slido question. Which method would you choose in this situation?

There's not necessarily one right answer. Oh, wow, we've got immediately a few different answers. That's great. Awesome. All right. I'll give people a little longer to consider before we wrap up this question. A lot of interest in interviews. That's great. Focus group discussions, surveys. We've got a couple for town halls and workshops. Awesome. Great. Thank you all. Okay. We've talked a little bit about the basic methods for collecting feedback and why you'd want to do it in the first place. We're going to now talk about the end result of client feedback collection, using data to improve services, and closing the loop with clients.

3. Improving Services and Closing the Feedback Loop

AB: Many of us have had the experience of sharing feedback and not hearing much back afterward. For anyone, but especially individuals who may have faced challenges that can impact trust or confidence, this can be discouraging and can leave them unsure of whether their input was valued. This is why we should close the feedback loop by thanking clients for their input, summarizing results, and explaining the action items that resulted from their feedback. It's also very important to close the feedback loop with your clients as a way of promoting trust and holding yourself accountable.

In the next slide, we'll talk about some key elements to include in your communications to make sure that closing the loop amounts to more than just checking a box. First, you need to make sure your clients actually receive the information. Consider what channels have worked for you in communicating with clients about other matters. Some considerations to keep in mind would include language barriers, digital literacy, and literacy in English or the native language. Sometimes it's best to make information available in multiple formats to accommodate your clients' various needs.

Next, when you're closing the feedback loop, consider going beyond simply acknowledging that feedback was received. Reflect the responses back to them and explain clearly how you'll act on them. You can employ some active listening techniques here. Examples of how you can express this might include, "Thank you to everyone who participated and provided feedback as part of our recent client feedback survey. Here's what we heard many of you say." Or "We're thankful for your participation and valuable contribution to the feedback survey," or whatever data collection method you choose, "Here are the immediate changes we've made as a result."

AB: As part of this process, set clear expectations. Sometimes you won't be able to act on certain elements of the feedback you received because they relate to things that are out of your control, or the requested changes would be too costly to implement. Clients still deserve to know this, rather than be left wondering why their feedback wasn't taken into account. Then, for the changes you do plan to make, lay out a timeline. This is an important component of accountability because you're telling clients not only what you plan to do, but when you plan to accomplish it by.

It's difficult to hold people to account, including ourselves, if we leave an open-ended timeline. Then, finally, it's important to recognize that not all clients will be interested in providing feedback or receiving your follow-up communications. That's okay. We can't, and we shouldn't, try to force people to get feedback. Our role is to make sure that communication channels are open and accessible, and to make the follow-up information available to those who want it. In terms of how you can close the feedback loop, there are plenty of tools you can use.

Here are a few examples. Phone call, text message, videos, town hall meetings, which can be used for data collection and sharing, existing group chats like WhatsApp, and then social media. Each of these methods has its advantages. For example, most of the options, aside from phone calls, allow you to reach many clients at once, which can be efficient, especially when you're tight on time. Some options, like phone calls and videos, are accessible to people who aren't comfortable with reading. There's not a clear, correct tool to use, and sometimes you might select multiple options to meet the needs of different clients.

AB: We've talked a little bit about accountability here. We're going to have a little slide on this now to think about the different types of accountable. Data collection can help us to remain accountable by highlighting both successes and gaps, but who should we be held accountable to? There are different types of accountability characterized by our relationship to the other stakeholders. Here, we'll briefly define four common types in resettlement contexts. The first is what's known as upward accountability, relating to our funders and our ability to demonstrate that we've used their money in a way that aligns with the original plan.

Maintaining compliance is a way of holding ourselves accountable to funders. Then we have sideways accountability, which refers to our relationship with other stakeholders, like partners that are characterized by more equal power dynamics. We may have formal or informal agreements with other organizations and agencies, and should make sure that we're upholding those agreements. Next, we have downward accountability, which describes our obligations to our clients. We should be responsive to their needs and feedback. Then, finally, we have something called inward accountability, which relates to the promises and agreements we've made with our own team members and other stakeholders, like board members.

AB: Client feedback data obviously helps to promote downward accountability since it keeps us accountable to our clients, but we can also use the data to hold ourselves accountable to other parties. You might use client feedback data in combination with programmatic or outcome data to get a fuller picture of your programming, which can be useful for promoting accountability in different directions as well. Now we'll actually see an example of closing the loop with clients to promote downward accountability. This will be our second case study. Again, I want to remind you that the text is in the chat if you prefer to read along.

Maria is a program manager at a national resettlement agency. She just finished overseeing collection of client feedback data on her organization's new virtual case management services program. Maria and her agency want to learn from the experience and prepare to make improvements based on client feedback and measured outcomes. Maria and her team carefully planned out what data to collect, selected appropriate methods, collected the data, and analyzed it to produce a set of key findings. These findings include action items for the team based on the feedback, a timeline for implementing those action items, and an overview of feedback clients had that the team is not able to implement, including why they can't do so.

Maria is now at the last step of the feedback cycle, namely closing the loop by communicating with clients. She's concerned that being served virtually might mean that clients haven't had the chance to form personal relationships with staff, so she's taking extra care to inform all clients about the results of the feedback data collection. Just like before, keep this in mind as you answer this Slido question. What is something Maria should consider when deciding which communication channel to use? Since this is open-ended, we'll give you a little bit of time to read, digest, and pop your answers in.

AB: Language barrier, for sure. It's a big one. Literacy issues, definitely. Trust and communication, love that. Accessibility of whatever channels you use. Have clients met her before? A number of clients, trust and language, literacy and trust. We're seeing a lot of trust today. I love it. Preferences, capacity and access, definitely. The amount of feedback you're trying to share, for sure. Cultural differences and how that might be received, absolutely. Technology, how are we already talking to clients? Good. Vocabulary and the complexity, I love that. That's really good, even if you're translating. Good comfort level with staff, definitely. Good. Let's give it another few seconds in case anyone else has thoughts, because these are great responses. Technology skills, definitely.

Even in a virtual case management program. How can we make sure clients receive it? Using trauma-informed communication, I love that. Definitely important. You know we're big on that at Switchboard. Fantastic. Thank you all. These are great considerations. See one more for trauma informed. Good. That was actually our last substantive Slido. Before we get to the Q&A, we'd like to wrap up with a question from you. What is one next step you plan to take to improve client feedback strategies in your programs? We've talked here about methods, about communication, so you've got some options for what you choose.

AB: Moving outside of just surveys, closing the loop, brainstorming with staff on what's needed. I love that. That can be really valuable. Seeing a lot of closing the loop. It's not always easy, but it is important. Good. Pseudonymizing, excellent. Using different platforms to help with specific needs, adding suggestion boxes, closing the loop. That's great. I know a lot of you talked about capacity restraints, so suggestion boxes can be great. Implementing sharing feedback with all stakeholders. That's great. Being mindful of what we're asking and why. Excellent.

That can help you with that question of what to do next. Great. Fantastic. Anyone else want to share their next steps after today's webinar? Yes, sharing them. Fantastic. Letting them know how their suggestions shape things. Following up, making sure clients feel comfortable, excellent. Really, really good. A lot of you are thinking about the way clients might be receiving this information, which is so important, just like it is in service provision. That's great. Fantastic. Thank you all so much for sharing those thoughts. I wanted to leave plenty of time for Q&A today because some of you asked some great things in your registration.

I'm going to open that up now. Feel free to start typing them in. In the meantime, I can certainly start answering the questions that came up during registration. A big one from a lot of you was how to engage clients in feedback data collection, which is a really, really fair question. That can be tricky. This obviously depends on your context, but I'll give you a few ideas here. First of all, incentives like gift cards, for example, can be appropriate. It obviously depends on your budget, but what you do want to consider is the level of the incentives. When you know that clients are struggling economically, as many of our clients are, you want to avoid making an incentive that is so valuable people almost feel that they have to participate.

AB: For example, if you're asking them to do a three-question survey, $100 grocery gift card would be a little bit disproportional. You can consider using incentives. Just be cautious about how you do it and the level that you do it to. That's one thing. Another thing I would suggest is playing around a bit with the methods you use. I know a bunch of us talked about digital literacy barriers today. You might be using a standard client feedback survey that's online. Even when you try really hard to ask very clear, simple questions, sometimes this is just really unfamiliar for people.

They either don't answer it or they don't answer it the way that you expect them to, so it doesn't necessarily create useful data. It's okay if we go back to something I said near the beginning, to think about ways you can collect data from clients that you might not get as much data from, but that you're really able to engage clients in. Things like interviews or something smaller scale. It doesn't have to be a whole interview. Maybe you ask the caseworkers that you work with to include one or two quick questions for clients at the end of their meetings. That's a way that you've already got a hold of them. You might be able to sneak in a couple of questions in a way that doesn't feel intrusive to them and comes up naturally in the conversation.

I think this also relates to something a few of you brought up with closing the loop in terms of who are clients comfortable talking to. If this is coming from their caseworker, they already know this person. They already share information. It might feel like less of a big burden to just throw in a couple of extra questions to that conversation. Those are some things I'd recommend trying. While I was talking, I saw a bunch of you submitted questions, which is great. We've got examples of lower resource feedback with clients who have language barriers.

AB: Yes, absolutely. I think, actually, something I just said is maybe something to try if you've got those incredible caseworkers with those language skills, you might consider really sitting down with what you want to know and narrow it down to just a couple of key questions. Then trying to tack that on to case management meetings or maybe closeout meetings for workshops you're running, something like that, where basically, you already have access to the clients. You're already in a space where they're talking to you. They're thinking about your services.

That can be a way to just verbally ask them questions. You still want to, obviously, do your typical consent processes, but that could be an effective way. I know that some people in the initial Slido mentioned that they actually do phone calls with their clients, which is fantastic. You can do the same thing in terms of low number of questions. I recognize that that's not quite as low resource because you're not incorporating those phone calls into something you're already doing. It's not part of an activity you're already doing, so that may or may not be a good fit.

Those are a couple of ways. I think, basically, trying to take advantage as much as possible of any place you're already encountering your clients is fantastic. That can be really effective. If you've got any time that they're coming to you for re-registering for something or whatever, that might also be a good time to ask them, "How did it go last time? I see you're back." Hopefully, that's a good sign. I would definitely think about making things bite-size and being realistic about the amount of data you can collect and then going from there.

AB: I hope that answers that question. Feel free to write in again if you have a follow-up. Tools for analyzing surveys. This is a great question as well. We will make sure to link some Switchboard resources on dealing with data. Honestly, many people use either Excel or Google Sheets or some form of spreadsheet. You don't necessarily have to be fancy about it. I think that that can be really effective. Even if you have open response answers that you're trying to look for, like key themes, for example, in, that can be great. No need to get fancy unless you want to.

I personally love to use R or Python to code, but most people don't, and that's okay. You don't need to. Yes, I would encourage you to just brush up on those spreadsheet skills. Another advantage is that there are a lot of resources out there to help you do that. We've got another, oh, this is a great comment. Thank you. McDonald's sponsored them to give $5 gift cards as an incentive to do surveys. That's awesome. That's a great opportunity to maybe build some partnerships with some local businesses, for example. Thank you for sharing that.

How to make sure the data we gather is valuable. Excellent. I think that there are two components to this. The first is making sure that you're asking questions in a way clients understand. Otherwise, the data that you're getting is not high-quality because people are not giving realistic responses. The other end of this is making sure that you're gathering data that's going to be useful for you, assuming it's high quality. I'll try to answer both of these. I think in terms of making sure that you're asking questions clients can understand, I know this can be a little bit of a stretch capacity-wise, but it's a good idea, when you can, to do a little bit of a pilot test.

AB: Even if it's not a big pilot test, if you're able to have a few, ideally clients, but even coworkers, read through and try to answer the questions that you've developed for your survey, even your focus group, whatever it is, that can be really helpful. A lot of times, you know exactly what you want to ask because you're the one who came up with the question, and it's easy for it to be misinterpreted. That's one thing you can do. If you're doing translations of surveys, even focus group guides, anything like that, the best practice is to have one person translate it from English into the target language, and then someone else translate that back into English so you can compare the two.

That can be a really nice way to catch little things that just happen sometimes, whether that's words that sound similar or typos, anything like that. That can help improve the readability or the understandability of your questions as well. Those are some things you can do to make sure that your clients are actually understanding the questions you're asking them. Then, on the other end of things, in terms of making sure that the data you get is useful for you, we have a couple of resources at Switchboard on planning data collection. If you've been to other Switchboard trainings, I will sound like a broken record, but I'm going to say it again, it can be tough to invest the time upfront in planning out to the degree that might be useful for you, but that is the best way to, I don't want to use the word ensure because things always happen, but to make it likely that the data you get is really, really useful for you.

AB: What I would start by doing is thinking about what is realistic for you to act on. What elements of your programming could you change if it was a problem for people or if they felt that something else would be better? Then work from there. There are things that you might love to change, but you know you can't. Asking about that doesn't really do anyone much good. Think about, for example, the accessibility of your services. Are there things maybe you could do differently about providing online options, after-hours options? Maybe you have it online right now, but you could potentially look into partnering with a community center or something to hold them in person.

If any of that feels practical for you, that might be something you want to ask people about then. On the other hand, you might be saying, "We just cannot have this in person. It's not going to work. I know that means we won't reach some people, and that's unfortunate, but this is where we're at. Don't ask about it." It goes back a little bit to what I said near the beginning, which is that when clients share this feedback, and then it's not acted on, even if it's because you can't, that can feel a bit disempowering. That's what I would suggest is planning from the standpoint of usefulness and then trying to pilot test when possible from the standpoint of making sure that your questions are understandable.

It's a great question. Thank you. We've got two more questions. I think we might be able to get to both of them. Strategies to improve client's trust and comfort level. This is a great one. I think that a couple of key things can factor into this. One would be start by asking questions that are not very sensitive. I think it's easiest to do this in a feedback setting because you're typically asking people, "How did it go? What went well? What didn't go well?" It's easier to avoid topics that may be sensitive. Another is to think about who presents the survey, interview, whatever method you use, to clients.

AB: You obviously want to make sure that whoever is doing this is comfortable with it, but it might be worth considering whether you can train some of your staff who clients already know and trust to do some of this. As an example, if you are working on a survey, maybe you decide that it's worth it, you have the time, you really want to do what we call an enumerated survey. You might remember I mentioned enumerators earlier. These are people who actually read the questions out to the clients and then record their answer. You might decide that you want to do this, and you're going to train some of your project staff who have direct contact with clients to be an enumerator, to read out these questions. That's one thing you can do.

I know us as the data people, depending on our specific role, we may or may not have that direct contact with clients. It's valid to think about whether they feel comfortable talking to us. You can also consider whether it's possible to avoid having to have an interpreter and whether you can have people ask about people's experience, whatever, in their native language. It just removes that one layer between them and the people asking questions, so that can be useful as well. Then the final thing I'll say is that if you're doing anything in person, you might want to consider where you're holding this.

If they come to your office a lot, they might feel comfortable there. There are really great studies out there about different participatory methods, which I mentioned just briefly, that show that sometimes giving clients a little bit more control over the location can be really empowering to them. There's something really cool called a walking interview where clients actually take the interviewer around their neighborhood, and they chat as they walk. It's a much more comfortable setting. It feels a little bit less sterile and like you're being interrogated.

AB: That's not always possible, but I would say think outside the box like that a little bit. It's also okay to ask them, "Would you feel comfortable doing this? If not, why not?" That's all good metadata. Good job for thinking about that. All right. We've got another question about getting client feedback without case managers to get a fuller idea of the care they're receiving. Absolutely. I know I just mentioned a bunch of ways that you could use your caseworkers in this effort, and it's totally fair to be thinking about if you want to get feedback on the caseworkers, how you might do that.

I would say in that case, when it's possible, start by maybe making yourself a little bit more familiar to the clients. Maybe there are ways that you can drop by the office when they're having meetings or workshops to introduce yourself. You might even put together a little video where you introduce yourself. Just simple ways that give clients a chance to understand who you are before you start asking them questions. That's excellent. Yes, definitely a good point. We've got one other. This is a comment, but I'm going to read it out because I think it's great, which is that when you're speaking, especially in person, tone of conversation is absolutely important for building comfort and trust.

A lot of my colleagues at Switchboard have some really great resources on having conversations with clients and how to be mindful of that sort of non-verbal communication, et cetera. Really important. Yes, absolutely. All right. I want to give people just another second or two to weigh in for the Q&A before we wrap up for today. We have time for maybe one more if there are any. If not, I can turn it back over to our learning objectives. Perfect. All right. As a reminder, our goal today was for you to be able to explain why we should collect client feedback data, compare feedback data collection approaches, and then to identify ways to use client feedback to improve services and close the feedback loop.

We mentioned at the top that we have our own little feedback survey for you to take, as we do at the end of every Switchboard training. We would really appreciate it if you take a moment to fill that out. It's very short. We'll pause right here for you to do that, and then we'll come back and wrap up with some recommended resources.

AB: All right. Thank you all. We do, I promise, look at those, and I appreciate it a lot. Just to close out here, and this will all be shared by email at the end, so you don't need to take notes right now, I just want to highlight that there are some resources you can use for further learning and to expand out from this. We've got a sample informed consent form. We've got an accompanying guide on collecting client feedback data, ways of leveraging feedback and community engagement, and planning surveys. We've got a data collection planning worksheet and templates for data analysis and action planning. I think that last one might answer some of the questions that you all had during this webinar about the best ways to take the data and actually use it to improve your services.

When those come around, I would definitely encourage you to check them out. They might be a good way to expand on the practical side of this topic. Until then, we will close out for today. I just want to thank you all one more time for attending today. I hope this was useful and you came away with at least something you can try to apply in your work. That's it for now. Thank you. [silence]

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