

## **CalWORKs / Child Welfare Partnership Project**

### **– Measuring Client Experience –**

Gathering feedback on clients' experience provides invaluable information for responsive and effective coordinated service delivery. Implementation of the Linkages Project involves streamlined processes, uniform screening tools and coordinated case plans. However the ultimate measure of success is a renewed sense of hope in families and staff, an organizational culture shift that places families at the center of service decisions and the absence of competing goals or conflicting timelines. The result is stronger families with the supports they need to achieve safety, stability and self-sufficiency. Asking families and staff how they are experiencing these changes is an important way to truly know if the desired results are taking hold.

Interpreting feedback from clients can bring considerable benefits to the agency. However, it is important for the effort to be seen as a management tool for continuous quality improvement and not as a way to judge individuals' performance. Using a practical, yet thorough approach to measuring the experiences of clients promotes a customer orientation throughout your agency.

Below are some general guidelines for measuring the experiences of clients as the implementation of Linkages proceeds in your county.

#### ***What Can You Expect to Learn?***

When client experience is sought out correctly and interpreted objectively and non-defensively, it can tell you what you are doing well and what still needs improvement. Do you know if families are feeling less confused and overwhelmed as a result of service coordination? Do you know if services are more responsive and less duplicative because caseworkers from both programs are working as a team? Delivering quality coordinated services requires meeting clients' needs as they perceive them. By asking direct, simple questions about

clients' experiences with the implementation of Linkages, key variables that may influence program success can be identified.

### ***From Whom Should You Seek Input?***

A sample of the target population your county has identified for coordinated services is the appropriate client group to survey. If your Linkages project serves large numbers of families, you may want to consider surveying a subset of cases. This can be a simple process of selecting every 3<sup>rd</sup>, 5<sup>th</sup> or 10<sup>th</sup> case to complete a survey. Select cases from each office or location operating under the new coordinated service protocols in order to gather feedback from all units participating in Linkages.

### ***When Should You Seek Input?***

Ideally, formal requests for feedback from active clients should be conducted during “natural” opportunities in the case flow process. For example, the logical transitions that occur when a case moves from one stage of service to the next can be perceived by clients as an obvious time to gain their feedback. How frequently input is sought can be coordinated with the cycle of your agency’s quality improvement process. Some counties may promote a continuous feedback loop between the agency and clients, while others seek opinions quarterly or semi-annually. However, less formal opportunities exist throughout the life of a case. For example, casual inquiries as to the client’s experience so far can become part of the regular transitions that are already built into the process and therefore feel more “natural”. This can be as simple as a single question that gets asked whenever a new caseworker is assigned to a family, such as — “What has your experience with our agency been like, so far?” Finally, case closure is another chance to gain the client’s perspective before they exit the system. Another alternative to a written survey are verbal

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exchanges with clients at other regularly scheduled forums, such as case planning meetings, family support sessions or other gatherings with clients.

### ***What Should You Do with the Information?***

Use the information received from client experience surveys to make positive changes in the Linkages program. Make certain that all staff understand the data and its implications for future behavior. It is often useful to have a committee of people representing all job classifications in the agency review the data to determine what action is warranted. Together, they can generate more diverse ideas and the committee can act as an advocacy group for continuous quality improvement.

### ***Building on Your Analysis***

Build your survey instrument or inquiry method from the Analysis of Client Experience your Linkages team completed earlier this year. This analysis can help guide the content and emphasis of your client feedback effort. Determine which aspects of the coordinated service system you are most interested in gaining feedback from clients about and, therefore, which questions should be posed to clients. The sample analysis template is included below for your information.

## Template for Analysis of Optimal Customer Experience

Process Point	Client/Family Experience	Staff Experience	Community Experience
			<b>Optional:</b> In this example, community is defined as community partners. Experience Bullets will be different if community is defined more broadly.
I. Prior to Contact	<ul style="list-style-type: none"> <li>▪ Perceives agency as helpful to families, rather than punitive.</li> <li>▪ Considers agency as a positive place to gain support, resources and information for their family.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Positive perception of clients.</li> <li>▪ Prepares for strengths-based approach to client issues.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Acts as “prevention partner” to direct prospective clients to appropriate entry points for services.</li> <li>▪ Positive perception of agency and clientele</li> </ul>
II. Initial Client Contact	<ul style="list-style-type: none"> <li>▪ Experiences relief &amp; curiosity by encountering open, informed, &amp; supportive staff who offer a wide range of options.</li> <li>▪ Understands the process &amp; what the next steps are.</li> <li>▪ Hears about partnership &amp; knows everyone they encounter is there to help.</li> <li>▪ Fears are addressed.</li> <li>▪ The “system” begins to look like a way to strengthen client/family, rather than a process they’re forced to deal with.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Confident, agency-supported &amp; full of helpful possibilities.</li> <li>▪ Has up-to-date information.</li> <li>▪ Uses quick but thorough screening tool (e.g., questionnaire).</li> <li>▪ Has sufficient information to immediately engage clients (e.g., what client can expect, services location(s), phone #s, staff contact name &amp; next steps in process).</li> <li>▪ Informs client/family about documentation needed at intake.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Clear understanding of community role in supporting agency mission.</li> <li>▪ Aware of “gateways” to services for at-risk children &amp; families.</li> <li>▪ Exercises collaboration &amp; coordination to promote outcomes of safety &amp; stability for children &amp; families.</li> </ul>
III. Intake	<ul style="list-style-type: none"> <li>▪ Knows what to expect during intake process.</li> <li>▪ Feels understood as people with strengths to be encouraged &amp; needs to</li> </ul>	<ul style="list-style-type: none"> <li>▪ Has necessary screening information from initial contact.</li> <li>▪ Gains sufficient understanding of client/family’s situation by using intake</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cooperates with intake process to provide requested information about family.</li> <li>▪ Complies with protocols to protect</li> </ul>

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	<p>be met, rather than “cases” to be processed.</p> <ul style="list-style-type: none"> <li>▪ Fully informed of rights &amp; responsibilities regarding release of information.</li> <li>▪ Timely, respectful &amp; accurate assessment of how family can best be served across programs to promote their success.</li> <li>▪ Hopeful &amp; confident of getting necessary help to positively change client/family situation.</li> <li>▪ Understands next steps in process &amp; what client/family needs to do next.</li> <li>▪ Introduced to team who will be involved in helping client/family learn &amp; achieve its goals.</li> <li>▪ Understands why interventions are necessary.</li> </ul>	<p>protocols (e.g., referral form, interview).</p> <ul style="list-style-type: none"> <li>▪ Fully informs client/family of rights &amp; responsibilities. Explains consent to release information to program’s partners and why it is needed.</li> <li>▪ Conducts intake process in an efficient, friendly, &amp; supportive manner.</li> <li>▪ Interactions with families are friendly &amp; non-adversarial.</li> <li>▪ Clearly &amp; respectfully informs client of next steps.</li> <li>▪ Sense of shared responsibility across team to address client/family needs by coordinating services for client/family benefit.</li> </ul>	<p><i>client/family privacy.</i></p> <ul style="list-style-type: none"> <li>▪ <i>Has confidence in agency as integrated family support resource within community.</i></li> </ul>
<p>IV. Coordinated Case Planning</p>	<ul style="list-style-type: none"> <li>▪ Experiences team as supportive, helpful, &amp; professional.</li> <li>▪ Confusion &amp; overwhelm are reduced or eliminated.</li> <li>▪ Excited about the possibilities to learn, improve, &amp; change relevant aspects of their life/family experience.</li> <li>▪ Feels like an equal partner in the decision-making process to set priorities &amp; develop plan.</li> <li>▪ Perceives plan as manageable, well-conceived and achievable.</li> <li>▪ Can’t wait to start their plan and knows who to talk to when problems arise.</li> <li>▪ Understands each team member’s role</li> </ul>	<ul style="list-style-type: none"> <li>▪ Observations, expertise, &amp; contributions of all team members are equally valued, considered, &amp; respected.</li> <li>▪ Family/staff/partners are fully functioning as a team and understand each other’s roles &amp; responsibilities.</li> <li>▪ Clients are willing, interested and fully participating in the development of their coordinated case plan.</li> <li>▪ Utilize assessment tools &amp; other structures to support coordinated service delivery.</li> <li>▪ Data is easily accessible &amp; used to inform case decisions.</li> <li>▪ All team members (family/staff/partners)</li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Works with agency to identify resource gaps in community network of services &amp; supports.</i></li> <li>▪ <i>Partners with agency to design &amp; implement community-wide strategies to meet client/family needs.</i></li> <li>▪ <i>Understands value of coordinated services for children &amp; families.</i></li> </ul>

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	<p>in helping to achieve plan goals.</p> <ul style="list-style-type: none"> <li>▪ Client data is translated into useful information that helps families make good decisions for themselves.</li> </ul>	<p>leave knowing what will happen next, what their parts are, who to send information to &amp; commit to updates during the case plan implementation.</p>	
V. Service Delivery	<ul style="list-style-type: none"> <li>▪ Receives effective, timely, seamless services with no duplication or conflicting timeframes/goals.</li> <li>▪ Feels like staff really knows what life is like for them and their families.</li> <li>▪ Gains confidence by trying out new skills &amp; utilizing supports to help them and their families.</li> <li>▪ When following the plan is hard, seeks out help as needed to manage challenges.</li> <li>▪ Continues to feel safe and supported by staff &amp; peers, even when issues or problems arise.</li> <li>▪ Encouraged &amp; supported to come up with own solutions to issues or problems, while also drawing on team wisdom.</li> <li>▪ Continues to feel like an equal partner in the process.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Both CalWORKs &amp; CWS staff welcomes questions from common clients &amp; collaborates to resolve issues.</li> <li>▪ Case plan simple to follow and update.</li> <li>▪ Families fully engaged in meeting their case goals.</li> <li>▪ All team members cooperate in keeping the case manager fully informed of progress.</li> <li>▪ Case reporting easier and quicker.</li> <li>▪ Clear and coordinated communication among team members (family/staff/partners).</li> <li>▪ Process &amp; documentation coordination takes less time.</li> <li>▪ Paperwork is simple &amp; easy to complete.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Identified community partners engage in helping family be successful (e.g., AOD, MH, courts, school, informal &amp; formal support systems, etc.).</i></li> <li>▪ <i>Community partners regularly report service delivery progress of client/family as requested by agency.</i></li> <li>▪ <i>Community trusts agency to monitor quality of service delivery &amp; client/family outcomes.</i></li> </ul>
VI. Follow-Up Support	<ul style="list-style-type: none"> <li>▪ Sense of accomplishment for achieving case goals &amp; excited to maintain progress.</li> <li>▪ Fully participates to plan most appropriate follow-up support.</li> <li>▪ Knows what community resources exist for ongoing strengthening of the family.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Knowledgeable about community resources with which families can connect.</li> <li>▪ Successfully links client/family to existing community resources outside the agency.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Advocacy &amp; support systems in the community are in place to assist client/family after transition out of program.</i></li> </ul>

Process Point	Client/Family Experience	Staff Experience	Community Experience
	<ul style="list-style-type: none"> <li>▪ Feels everyone believes in their family's ability to be successful.</li> <li>▪ Tells all their friends and neighbors about the positive experience they had.</li> </ul>		
Overall Results	<ul style="list-style-type: none"> <li>▪ Feels stronger, more skilled, capable, and self-reliant.</li> <li>▪ Knows life can be difficult and they cannot only cope, but can succeed.</li> <li>▪ Appreciative of the team and its experience &amp; knowledge.</li> <li>▪ It will be hard not seeing their support team, but know they are just a phone call away.</li> <li>▪ Parents call the agency occasionally for resources or to check-in, but do not re-enter system!</li> </ul>	<ul style="list-style-type: none"> <li>▪ Proud of the team and family's progress and success.</li> <li>▪ Delighted and energized by the entire process.</li> <li>▪ Amazed at how quickly things progressed for the families.</li> <li>▪ Share accomplishments of improving lives of families.</li> <li>▪ Feel broader sense of career path due to improved understanding of other program.</li> <li>▪ Staff hear from families occasionally to check-in, but do not see them re-enter system!</li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Community acts as "safety net" to promote safe &amp; stable families.</i></li> <li>▪ <i>Community maximizes its resources to improve outcomes for children and families with timely, effective, coordinated services.</i></li> </ul>

## ***Sample Survey***

The following page contains a sample survey designed for clients. This is intended as an example from which counties can design their own survey instrument or other method to understand client experiences with Linkages. This sample survey is comprehensive in that it addresses all aspects of the items identified in the Analysis of Client Experience template. Counties can choose how broad or narrow they want to focus their inquiry. For example, Linkages committees can identify the top 3 questions that represent areas of critical improvement and focus gathering client input just on those topics. If a fuller understanding of client experience is needed, then a more extensive survey can be designed. The sample survey below contains 15 questions, which is the maximum number of questions you would want to ask of clients at any one time.



## Client Survey

### How Are We Doing on Serving You Better?

*Survey Instructions: Our agency has been working hard to better coordinate services for families who receive both CalWORKs and Child Welfare Services. You are the most important people to let us know how we're doing. Please take a few minutes to think about your experiences with our agency over the last few months and answer the following questions. Your name will not be connected to your answers. Instead we're gathering feedback from many families and using that information to improve our services. You do not have to participate in this survey, but we would certainly appreciate knowing what you think. Read each question below and mark an X in the box that best describes your experience.*

1. The agency is a caring and supportive place for my family to get the help we need.

Always	Sometimes	Rarely	Never

2. Everyone who works for the agency is helpful and courteous when we call or come in for an appointment.

Always	Sometimes	Rarely	Never

3. I know who to ask for help when I need support to make good choices for my family and my children.

Always	Sometimes	Rarely	Never

4. If I'm worried about meeting court timelines or other rules, the team helps fit all the pieces together, so everything gets done when it's supposed to.

Always	Sometimes	Rarely	Never

5. Everyone at the agency makes me feel like a real person, instead of "a number" or "just another case".

Always	Sometimes	Rarely	Never

6. My family has a team of people working together to help my family become successful.

Always	Sometimes	Rarely	Never

7. The team helps us understand what is expected of us, so that our children can live in a safe, stable home.

Always	Sometimes	Rarely	Never

8. I feel confident that my family will get the help we need to change our family situation for the better.

Always	Sometimes	Rarely	Never

9. There's always someone available to explain what steps I need to take to get my family the help we need.

Always	Sometimes	Rarely	Never

10. The team asks for my opinion and ideas about what's best for my family.

Always	Sometimes	Rarely	Never

11. My family is getting the services we need, when we need them to reach our goals.

Always	Sometimes	Rarely	Never

12. The team asks me what I think about how the services are working and what needs to improve.

Always	Sometimes	Rarely	Never

13. If there's a problem or things aren't going well, the team still believes in us and supports my family to keep trying.

Always	Sometimes	Rarely	Never

14. Both my caseworkers and our family work as a team to develop my family's case plan.

Always	Sometimes	Rarely	Never

15. When our family reaches a goal, the team celebrates it with us.

Always	Sometimes	Rarely	Never

Thank you! Please return your survey to the address shown below: