



Listening **BETTER**

10 Lessons from LIFT's Member Feedback Survey



LIFT is a national nonprofit dedicated to working with – not for – low-income families to design solutions to end intergenerational poverty. We help provide the skills, tools and resources individuals need to meet basic needs and work toward long-term aspirations. LIFT’s work is focused on parents and caregivers of young children because we know the early years are the most critical in determining lifelong health, happiness and success. LIFT believes that by investing in the power and potential of parents we can ensure economic opportunity for children.

ACKNOWLEDGMENTS: LIFT is grateful for the support of critical funders and partner organizations that have pushed for change across the social sector. Funders like Citi Foundation and funding collaborations like the Fund for Shared Insight provide resources to support nonprofits in building the practice of listening to the people they serve. Organizations like Keystone Accountability provide technical support on building systems of continuous feedback and initiatives like Feedback Labs offer a space for social sector organizations to thought partner on best practices.

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INTRODUCTION



Over the last two decades the social services sector has spent significant resources on uncovering what actually works for the people it serves, raising up the use of randomized control trials and similar methods to measure the success of government and nonprofit programs. These long-term efforts have been very effective at giving a thumbs up or thumbs down on whether or not programs work; however, they often fail to answer the question of why (or why not). As a result, we miss many of the details that really matter – like what’s the value proposition from a client’s perspective and how to make changes that accomplish even greater results for families and communities.

In order to tackle complex and persistent issues like intergenerational poverty, we believe we not only need to learn more about what works, but we need to expand our view of *how* we learn.

LIFT believes a critical first step in answering the question of why a program works is to *listen* to the families we serve. By soliciting input from our clients (who we call members) about what we’re doing well and what we need to improve, we are able to craft programs that address the complex, real lives of the people we seek to help. If we want to get better at how we deliver services, listening to those we serve and understanding how they view our programs simply makes sense.

This isn’t a new approach. In the corporate sector, companies that fail to listen to the unique voices of their customers feel the impact directly on their bottom line. That is why for decades the private sector has integrated customer feedback into their service delivery and performance management systems. They have long understood that listening to customers is an extremely efficient way to understand where improvements can be made both while designing products and after taking them to market.

That’s not to say that other sectors are tone deaf. No nonprofit or public agency would say client feedback is immaterial, or that unique circumstances and context are irrelevant. However, most of us do not allocate substantial resources to collecting feedback in a systematic way, often because stakeholders do not prioritize this. The end result is that the voice of those we serve – who often know best what is working and what is not – is typically underrepresented in decision-making.

LIFT is proud to be part of a movement to elevate client voice and to serve as a demonstration for other organizations interested in beginning or expanding their feedback practice. There are several components to LIFT’s feedback system, which we call Constituent Voice: a survey, interviews, focus groups and the process of making changes based on member input. This brief focuses on lessons learned from creating and rolling out our member feedback survey over the last three years.

History: Member Feedback at LIFT

At LIFT we have spent nearly two decades working with low-income individuals and families to achieve their goals. We believe that strong, trusting relationships with our members are critical to supporting families in securing living wage employment, improving their financial security and accessing public benefits.

When working with LIFT staff, our members drive the agenda in setting their goals. We do this because they are the experts of their families' lives. In this way, member voice has always featured centrally in LIFT's values and how we work with members. However, there was a critical gap in how we measured our results and looked for ways to improve our program outcomes. Like many other organizations, LIFT's evaluation agenda counted the easily quantifiable results, like the number of job applications completed and the number of jobs secured. With a commitment to rectifying this misalignment, in 2013 we embarked on a journey to place member feedback front and center in our work, not only with parents and caregivers, but also in our learning agenda.

LIFT's Top 10 Lessons

Based on three years of experience implementing Constituent Voice across LIFT's national network, we have learned a lot about what works, and what doesn't, when gathering member feedback. We have identified 10 best practices for designing and systematically implementing a member feedback survey.

01

Leadership buy-in is a must

Collecting and using client feedback is easiest and most effective when it is part of your organization's culture, meaning the value and importance of feedback is appreciated by everyone involved. Collecting feedback requires time and resources, from the frontline staff who are administering surveys, to the evaluation staff who are making sense of results, to the leadership team who is responsible for turning findings into action. Without a commitment to ensuring high quality results at every step, the value and efficacy of the whole process can easily slide (especially given the constraints on many nonprofits' time and resources).

So how do you create and nurture a culture of feedback? At LIFT, it started at the top,

with our CEO, president and board of directors. LIFT's leaders made a commitment to elevating feedback as a key information source, and – importantly – instituted incentives to ensure feedback systems were implemented with integrity. In particular, each region had a target set for their survey response rate as well as scores related to service quality, and progress was reported on a monthly performance scorecard. Regions would use the scorecard to discuss how they fared against one another and over time, and to reflect on the response rate and how they could improve it. These efforts led to a significant improvement in response rates. In our first year of implementation our average response rate was 35 percent; by our third year, it had increased to over 60 percent.

02

When designing questions, look to your frontline staff



Gathering feedback can swiftly turn into a fruitless exercise if the collected information isn't useful to decision-makers and practitioners within your organization. Survey questions that are designed in a backroom with dim lighting don't typically produce information others will find actionable. And feedback that isn't actionable is a waste of time and resources. If it can't be used to improve your services, why collect it in the first place?

Fortunately, you shouldn't need to look far to find experts on what you should be asking. When you're looking for information that can improve your program, start with your practitioners. Staff that are working on the front lines of your organization know the successes and challenges better than anyone else, and they can help gauge whether you're asking the right questions in the right way.

03

Don't reinvent the wheel

Crafting survey questions can be a complex process, with a long list of dos and don'ts. In many situations it may be necessary to create survey questions from scratch that are specific to your organization. These questions might contain specialized language or ask about unique activities. In these instances it is important to test questions first for clarity and interpretation (see lesson four).

On the other hand, when investigating common topics like client loyalty or service quality, it is good practice (and can save you considerable time) to look for externally-developed questions first. Questions that have been thoroughly tested and found to be reliable self-reported measures by outside

sources can give you confidence that your survey data are trustworthy. Additionally, externally validated measures often allow you to benchmark results against other groups of respondents, providing useful context for interpreting findings.

At LIFT we rely on a commonly used question of client loyalty called the Net Promoter Score, which measures the likelihood that a client would recommend your services to others.¹ By integrating this question into our survey we are able to compare client loyalty at LIFT to organizations in the corporate sector and ultimately to other non-profits participating in the Listen for Good initiative,² providing us with a benchmark for success.



¹ Bain & Company. *Measuring Your Net Promoter Score*. Retrieved from: <http://www.netpromotersystem.com/about/measuring-your-net-promoter-score.aspx>

² Fund for Shared Insight. *Listen for Good Overview*. Retrieved from www.fundforsharedinsight.org/listen-for-good-overview

04

Test, test and test again



A key step in developing new or revised survey questions is a testing process to ensure that questions are clear, comprehensible and interpreted correctly by respondents. This testing process can take a variety of forms and is crucial to the development of useful and reliable questions.

LIFT underwent our first methodical testing of survey questions in late 2014, using a series of member focus groups to gather input on the clarity of questions. During focus groups, members were asked to explain their interpretation of different questions and restate the questions in their own words. Discrepancies between the intended meaning and the actual interpretation led to wording changes on many questions.³ When redesigning questions we also tested them for literacy level, aiming for sixth grade reading ability. Online platforms like Readability Score helped us easily assess the literacy level of questions. Finally, we pilot tested the revised questions with a dozen members in two regions. This helped us simplify the questions to reduce any room for error

in interpretation, increasing the reliability of responses.

Recently, LIFT has begun a testing process to compare the effectiveness of two different survey scales. The first – an 11-point numeric scale – has been used since the beginning of LIFT’s member feedback survey in 2013; this scale ranges from 0 to 10 and enables LIFT to interpret responses using the same analytical method as the Net Promoter Score discussed above.⁴ The second scale – a five-point labelled one – aligns more closely with best practices in survey research, which recommend the use of shorter scales with descriptive labels in order to collect reliable data.⁵

So far we are seeing some differences in results from the five-point labelled scale, but we have more testing to do to increase our sample size and explore other scale options. The one thing we know for sure is that the most effective way to learn how your questions (and response options) will be interpreted is to test them out directly with respondents.

05

High quality data relies on a strong survey pitch

In order to collect data that are highly reliable and represent a full range of client experiences, it is crucial to gather responses from a large and balanced group of clients. An important step in reaching a large number of clients is obtaining a high response rate – the percent of clients that actually take your survey.

When LIFT first rolled out our survey in 2013, our response rates hovered around 35 percent. While our feedback system enabled us to collect data from members after every meeting, we had an important hurdle to overcome – getting members to agree to spend their limited time and energy taking LIFT surveys. We realized that we needed a

³ The Readability Score online tool can be accessed at <https://readability-score.com>

⁴ Bonbright, D., Lake, B., Sahaf, S., Rahman, R., & Ho, R. (2015). *Net Promoter Score for the Nonprofit Sector: What We’ve Learned So Far*. Feedback Labs. Retrieved from <http://feedbacklabs.org/net-promoter-score-for-the-nonprofit-sector-what-weve-learned-so-far>

⁵ Schneider, D., et al. (2008). “Measuring Customer Satisfaction and Loyalty: Improving the ‘Net-Promoter’ Score.” Retrieved from <http://www.van-haaften.nl/images/documents/pdf/Measuring%20customer%20satisfaction%20and%20loyalty.pdf>



THE VOICES OF OUR MEMBERS HAVE HELPED US IDENTIFY CRITICAL BARRIERS THEY FACE, BRAINSTORM APPROACHES TO TACKLING THESE CHALLENGES AND IDENTIFY TWEAKS AND CHANGES TO MAKE OUR APPROACH STRONGER. THIS CONSTANT CYCLE OF FEEDBACK ALLOWS US TO REFINE AND IMPROVE AS WE GO.



better approach to communicating the value and importance of the surveys to members. In short, we needed a better “pitch.”

We tackled this hurdle by crafting simple guidelines for frontline staff, encouraging them to tailor the “ask” so that it felt natural, but still included key talking points such as: the survey was short and confidential and responses were critical for helping us improve LIFT services. We also helped staff troubleshoot common situations that led to surveys being skipped by having them role play until they felt comfortable. While this process focused on increasing our response

rate, we were also careful to impart the importance of respecting a member’s decision to decline a survey, not only because we strive to be respectful of our members and adhere to basic ethics, but also because compelling members to complete a survey can lead to poor quality data.

After adopting these changes to improve our survey pitch, LIFT saw an increase in response rates, rising to as high as 75 percent in some regions. This high response rate gives us confidence that we’re collecting more reliable and representative data on our members.

06

Total anonymity is not necessary for reliable data

When LIFT first rolled out our survey, all responses were anonymous. By collecting data anonymously we were able to guarantee to members that their feedback – positive or negative – would not have any impact on their relationship with LIFT. Unfortunately, this approach also limited our ability to gain a deeper understanding of trends in member feedback because we had very little information about the characteristics of each respondent.

To address these limitations, LIFT began piloting non-anonymous surveys with a subset of members in early 2014, using a unique member ID number. These surveys remained confidential, meaning that member-facing staff in the regions could not

access individual responses, but they were no longer anonymous to LIFT back office staff. The change was clearly communicated to each member taking a non-anonymous survey.

To assess the impact of this change, LIFT’s evaluation team compared the responses from both types of surveys and found that there were no significant differences in how members responded. Following these findings, we moved to make all surveys non-anonymous. The change enabled us to link survey data with other administrative data sources, leading to more complex analyses (such as whether or not stronger feedback correlated to better program results) and ultimately better-informed conclusions.



07

Be mindful of courtesy bias

A common concern in survey research is the presence of positive response predisposition or courtesy bias, which is the tendency of respondents to provide positive answers regardless of their true sentiments. Courtesy bias can be especially prevalent in the social sector where respondents may feel grateful or beholden to organizations that offer much-needed services, regardless of their quality.⁶

Historically, LIFT surveys have shown evidence of courtesy bias. In the last year, almost half of respondents chose the highest possible score (i.e. a 10 on a 0-10 scale) in response to every question they were asked about the quality of LIFT services. At the same time, many of these respondents chose lower scores for questions not directly related to LIFT services (e.g., questions assessing their own self-efficacy), showing that courtesy bias was less prevalent for questions not related to LIFT.

Courtesy bias is a challenge that many organizations face. At LIFT, we've begun exploring different ways to tackle this issue, including the testing of new question types, formats and response options. This includes open-ended questions that ask members to describe what LIFT does well or what LIFT needs to improve in their own words, providing an additional opportunity to provide constructive feedback. Throughout this testing process we plan to evaluate the effectiveness of individual questions (including their susceptibility to courtesy bias) and eliminate questions that don't elicit meaningful variation in responses.

While reducing courtesy bias is a work in progress, being aware of the impact that it has on survey data is crucial to accurately interpreting results. By taking courtesy bias into account we know to interpret very positive results with caution and to dig deeper into data to search for actionable feedback on how to improve services.

⁶ Kirytopoulou, N. (2013). *Overcoming the Courtesy Bias in Constituent Feedback*. Feedback Labs. Retrieved from www.feedbacklabs.org/overcoming-the-courtesy-bias-in-constituent-feedback

08

Use focus group discussions to provide color to results

Surveys can be an efficient and cost-effective approach to gathering high-quality information on trends among respondents; however, even the most carefully designed and executed survey won't be able to paint a complete picture of clients' experiences with a program. There is a (necessary) limit to the breadth and depth of questions in order to make surveys a manageable length. And response options are typically standardized to enable straight-forward analysis and aggregation. Plus, as discussed under lesson seven, all surveys can be susceptible to response bias of one kind or another.

Realizing this limitation of our feedback surveys, LIFT first set up a series of focus groups in 2014 to dive deeper into the trends we were seeing in our results. We wanted to

collect qualitative details that would confirm or challenge our assumptions about certain findings and provide insight into the rationale behind responses. This process allowed us to not only better understand members' responses – and where we could improve how we phrased questions – but also created a space to have a dialogue with members around the challenges they face and how LIFT can better meet their needs.

For example, through these focus groups we heard resounding interest from members in more opportunities to connect with peers. These included occasions to share advice on job searches and parenting as well as to simply receive encouragement from others in similar situations. LIFT has since integrated peer groups in many of our programs.

09

Feedback and rapid prototyping go hand-in-hand

Client feedback surveys are ideal for identifying what needs to be tweaked about the nuts and bolts of a program – what is going well and what should be changed to better meet client needs. However, feedback is also particularly helpful when designing new interventions. In the early stages of shaping a program, client input can provide critical information on the usefulness and accessibility of services before any program details are set in stone. Furthermore, getting rapid feedback during early implementation can help you mitigate future problems before it's too late – or costly – to reverse course.

LIFT is currently piloting new programs that aim to strengthen members' financial literacy and access to social capital, and we're collecting user feedback every step of the way. The voices of our members have helped us identify critical barriers they face, brainstorm approaches to tackling these challenges and identify tweaks and changes to make our approach stronger. This constant cycle of feedback allows us to refine and improve as we go. And it gives us confidence that we're developing a service that is valuable and accessible to those with whom we work. When building something new, feedback and rapid prototyping are a match made in heaven.

LIFT's Approach: Quick Member Surveys and Monthly Pull-Ups



LIFT's feedback survey – one piece of our broader Constituent Voice feedback system – serves as a real-time vehicle for capturing member input. Members complete short surveys at the end of each in-person meeting on one of several iPads in each LIFT office. Survey questions cover three broad categories: service quality, relationship quality, and client loyalty. Each survey contains five to eight questions that have been selected from a larger pool, and members respond to a different set of questions each time they come. This approach allows LIFT to collect information on a diverse set of topics while limiting the burden on individual members, as each survey only takes one to two minutes to complete.

LIFT administers surveys on iPads for several reasons. First, the iPads allow members to self-administer surveys, creating space for more honest feedback. The iPads are also a cost-effective alternative to telephone or in-person attempts to gather feedback, which can take significant staff time. Finally, collecting feedback while members are physically in the office allows us to reach members who don't have regular access to a phone or computer.

LIFT's evaluation team regularly monitors survey responses for trends and actionable insights and shares takeaways with organizational leaders on a monthly basis. LIFT's leadership team digests and discusses key findings and uses the information to identify opportunities for growth or improvement. Importantly, LIFT also takes the final crucial step of closing the feedback loop with members by regularly sharing survey results using visual presentations displayed on television screens in each office.

10

Continuously reassesses and make improvements based on lessons learned

LIFT's approach to gathering feedback relies on a process of continuous reassessment and modification, with the ultimate goal of collecting the most reliable, actionable and informative feedback that we can. Over the last three years, we have revised our survey methodology five times to integrate lessons learned along the way, many of which are shared here.

Importantly, our approach to administering surveys allows us to be flexible. By collecting responses on an iPad, we can easily change the wording of questions without printing new materials or retraining staff. Just as importantly, by regularly digging into the data to look for trends and actionable insights, we are able to adjust in real-time to gaps in information or poor quality data.

Instead of waiting for the perfect methodology before diving in, we've chosen to jump in and learn as we go. The result is an approach to collecting feedback that is directly informed by practice and tailored to LIFT's unique needs.



Feedback's Impact on LIFT

Over the last three years, LIFT's Constituent Voice member feedback process has helped LIFT listen to our members and elevate their voice as we think critically about what we're doing well and what we need to improve. It has been a journey for the organization to learn how to collect meaningful feedback and has required significant effort. But the value has been clear.

By integrating feedback into our learning agenda, we have made various improvements to what we do and how we do it. For example, based on feedback on the quality of outgoing referrals LIFT developed a strategy to better connect members with community partners. We began by collecting clearer data on referrals so that we could assess which were (or weren't) producing value for our members. We also conducted staff trainings on how to ensure referrals were relevant to member goals and how to clearly communicate contact information, referral appointments and other practical information to a member. As a result, LIFT increased the number of members who received services from trusted community partners.

Similarly, in response to input on the accessibility of meetings, LIFT began piloting flexible hours and virtual meetings to meet the demands of busy members. This allowed us to reduce the time burden of accessing LIFT services and, ultimately, reach more members. Our New York office added evening and weekend hours to facilitate members with 9-to-5 jobs, and our Los Angeles office began offering phone meetings to returning members.

Finally, based on feedback and staff input, LIFT is creating more opportunities for members to connect with each other in safe, supportive environments. These include formal opportunities like LIFT-facilitated peer groups and workshops, as well as informal opportunities like a new member lounge in New York that features free coffee and internet. Members expressed interest in peer groups loud and clear through the survey – and through conversations with front line staff. LIFT has now incorporated peer-to-peer interventions centrally in our work.

Over the last few years, we have learned through trial and error about how to meaningfully integrate feedback into our work. What started with a survey evolved into a much broader approach to gathering member input that has influenced the design of program pilots, helped us tweak our program offerings and has illustrated to members that we value their input and will use it to ensure we are always designing and implementing programs that serve them better. And in the end, that is the ultimate goal of our work.



ADDITIONAL RESOURCES

For more information on LIFT's process please contact feedback@liftcommunities.org.

- Stanford Social Innovation Review: Listening to Those Who Matter Most, the Beneficiaries
www.ssi.org/articles/entry/listening_to_those_who_matter_most_the_beneficiaries
- Harvard Business Review: The One Number You Need to Grow
www.hbr.org/2003/12/the-one-number-you-need-to-grow
- Keystone Accountability: Constituent Voice Technical Note
http://feedbackcommons.org/sites/default/files/constituent_voice_technical_note_2015_v1.1.pdf

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