2017-2018 ConnectHome - Baseline and Survey Tracking, 11-29-17

Dina Lehmann-Kim: [In progress] -- heard about how they conducted their surveys and how they continue to track their progress. We're really lucky to have them on today. And we are really fortunate to have Calvin Johnson, the deputy assistant secretary for research, evaluation, monitoring in HUD's Office of Policy Development and Research join us today.

Calvin and his team led the first baseline survey of ConnectHome pilot communities. And so will have a lot of information and good tips to share with you. Also presenting today from PD&R is Dylan Sweeney who's a policy analyst working with Calvin.

So what we're going to do is we'll go through their presentation, which takes a lot out of chapter three in the playbook and I'd love for you to refer to the playbook after today's presentation. So without further ado, I will turn this over to Calvin and Dylan. Thank you so much.

Calvin Johnson: Hello and good afternoon. This is Calvin Johnson. You'll be hearing from Dylan shortly, but just wanted to start off by talking about establishing your baseline. And so specifically, when we think about establishing a baseline -- I'm sorry, just one thing, do I need to advance the slides or --

Christina Payamps-Smith: Yes. You can advance the slides.

Calvin Johnson: Okay. By hitting page-down?

Christina Payamps-Smith: Yes. If that's not working, I can advance them for you.

Calvin Johnson: Okay. Please, because I just tried it and it's not working for me. So we're down to slide four now. And one more, there we go. And so one of the important features or reasons -- or there are a few important reasons why we want to establish a baseline.

One, it helps us better understand the needs of our residents as it relates to not only access to the Internet, but the things that they might have a need to have access to the Internet for. It also allows you to set reasonable goals, to think about developing your action plan, like what is it going to take to -- once you actually establish the goal, what is it going to take for you to get there, what are the strategies that you might want to actually think about?

And then it also provides you with a way of having a point of reference so that as you begin to move forward, you're making progress, you can look back and see how far you've come.

You can start assessing whether your plan is working, which parts of the plan is working better than others and having that baseline is a really significant point of reference for you. So if we move to the next slide. Now, you might be thinking how do we do this, we're not statisticians, we're not researchers.

Well, no need to fret. There are a number of ways to actually build that capacity or actually establish it. We found these ways to be strategies that you should first explore. So one, which is a fairly common one, is you need to find out whether there is already capacity within your organization.

When most folks think about having resource capacity, they think about having a shop within their organization dedicated to doing research. That's not necessarily what you need. You need to have someone with skillsets to do this work whether they are part of a research office or not. So you might want to look within your agency for that.

If not, look within other local government agencies, because in many cases, if the department isn't there, the skillset might be there. You also might want to look for other local research partners. Academic institutions are really good at this, whether it's a community college, four-year college, other nonprofit research groups within your locality.

These are folks who, in many cases, want to work on projects like this and it's not a huge lift for them.

And then the other area that you might want to think about is that are there staff with experience conducting surveys and data analysis, not necessarily being a researcher, economist or whatever it is that you think you might need, but are there people who have certain skillsets that you could bring to bear in trying to capture data and actually analyze the data.

Next slide, please. Now, we talk about research capacity and I want to step back from a term research capacity a little bit and now talk about performance monitoring team.

So what we're talking about here is you want to have a team of folks who you kind of rely on and you draw on their expertise and their understanding of the challenges, their understanding of the plan and how is that you move forward. You want to have that team as a team that can help you monitor your performance.

This is like the ground truth team. So in many cases, what we're talking about, especially given this initiative, you're going to have a public housing agency, your research partner and often a residential council or somebody kind of playing that role.

That's important, because you need folks to help you define the survey purpose, you're going to have to have folks to help you coordinate the actual survey administration. They may have resources that they could bring to bear, they can support you in understanding how best to train staff.

With your resource partners, they're going to be folks who could potentially provide you with the technical expertise that might be needed around survey methodology, how to draw sample and then how to best analyze the data and get the types of results that you need to pull out of the data.

And then for the resident council or some other group playing that role, they help with outreach, encouraging respondents to actually respond. So actually encouraging residents to respond. And then in many cases, they help to administer the survey, because they are a trusted space within that community. Next slide, please.

So now we're going to talk about surveying residents. Next slide. So step one, you want to identify the population and key methods. So you want to focus on who will you focus on connecting, which metrics are most important. And we'll talk about -- we'll show you an example of a survey that kind of gets to some of those things.

And what data exists that you can draw on so that you're not reinventing the wheel? And so here are some examples at the bottom. On the bottom-left, you see example populations.

So as part of the ConnectHome pilot, we were focusing on households with school-aged children, but you could potentially focus on household head via seniors or public housing residents or any other combination thereof.

Part of having existing data or at least kind of getting a sense of where those gaps are, where those digital divides are greatest will kind of guide you where it is that you might want to go. Example, metrics, in-home [inaudible] adoption rates, percent of the population that has computing devices or the percent of the population that is digitally literate; right?

So those are just some of the metrics that you might want to consider and these are examples. Next slide, please. Slide -- step two is actually about selecting your survey sample. Again, you might want to have your research partner involved here. This is to kind of put it in basic terms. You want to create a list of the population you're targeting.

You want to determine what your sample size is going to be, you want to actually conduct a sampling technique that you are planning on conducting as advised by your research partner and then you want to compile your sample list. And by this, what this is doing is saying that you don't have to go out and survey every household within your targeted community.

Sampling is a way to approximate what that population will look like by taking a subset of them, but the sampling technique is really important. And so let's go to step three now. Step three, designing your survey. First rule, keep it short. You want to ask whether households have high-speed Internet access at home.

So for example, a bad question would be, do you have Internet, good question would be, do you have access to high-speed Internet at home. Make it easy to understand.

So you can see the example here that we have as a bad example, please describe digital literate -- please describe how digitally literate you consider yourself to be in terms of capabilities with devices, ease of navigation. I'm confused reading that. So that's a bad example. A good example, are you confident in your ability to use a device, like a computer or tablet to access the Internet?

So really easy to understand, it's more active, more positive. So you want to focus on how the reader might read the question and again, your research partner will be able to help you with that.

And then one of the things that we found out during the ConnectHome pilot is that there are a lot of languages spoken within housing authorities across the country.

And so you want to know whether English or whether it needs to be translated into Spanish, or Russian, or Farsi, or whatever it is. I think we probably translated the ConnectHome across the 20-plus communities into, I think it's like 12 different language, if not a little more than that.

So it's important to know who it is that you are delivering the survey to to make certain that the folks are able to read it and understand it. So translation is important. Next slide, please. Slide four, administer your survey. You want to develop training material, you want to make certain that whoever is going to be administering it is trained to actually administer it.

Then you want to get out to serve to actually survey residents and then you want to have follow-up. Now, just quickly on follow-up, although I know that there's a slide later that will talk about that, you want to think about the various strategies for following up. Telephone is good.

You know, we've learned from our experience that maybe knocking on doors, using coordinators who are already going to be in contact with these families as another kind of frontline to actually administer the survey is another helpful tool and then there's some other strategies that will be talked about later in terms of best practices. Next slide, please.

Step five, analyze your result. So you might remember at the -- I think it was one of the first slides I talked about the importance of having baseline and actually assessing it comes full circle. The information will help you with your annual reporting, goal-setting, communicating and also, continuous program improvement.

Baselines are key. You can't move forward without having a baseline, otherwise, you don't know what target you're actually trying to hit. Next slide, please. So here's an example of the ConnectHome -- the pilot, the baseline survey. And I don't know whether you all have full screen. This is probably best viewed in full screen.

But if you look at the survey, the very first question, do you have or does anyone living in your household have Internet access in your home, including like smartphones? Yes, no. And then we take them down two different paths and it should be very quick for them to answer. And so you see here we have three questions -- three, four, five questions.

If you start off by saying yes, then we want to know how is it that you access it and you just check the box, check the box, check the box. Then we want to know which devices you're using and then we end with a question about whether you've heard about ConnectHome and if you have Internet in your home, is it a free or discounted service?

So really quick to get at and we basically advertise survey is -- as being less than five minutes. And if you said no, it is even quicker to actually complete. So next slide. So from the baseline survey from those questions on the survey, this is what we would call our attempt at developing an infograph. So what this survey does it is gives you a sense of a house.

So since we were targeting households, it shows you now that 34 percent of those households that we sampled had high-speed Internet access with computers, laptops or tablets. Thirty-five percent of them were under-connected, meaning that they were connecting to the Internet, but they were using smartphone only or under or other under-connected approaches.

And 31 percent didn't have any access to the Internet at all. Now, again, those five questions allowed us to slice and dice the data in many ways and we have a two-pager or three-pager that kind of lays out the actual findings in more detail. But again, keeping it really basic and simple and just getting at what it is you want to know allows you tell a very powerful story.

And again, this is an infograph that I think kind of sums up what it is we learned at baseline. Next slide, please.

Dylan Sweeney: Okay. Is everyone see the next slide? Hi. This is Dylan Sweeney. I'm an analyst who works with Calvin. So this is a -- this is one of the many options that you can use to find your own baseline in a way similar to the baseline that we determined by telephone and in-person survey.

Each resident has a recertification form that they have to fill out or has the recertification process and then this is the form that it's filled out in. And in that form, there are five fields that are marked PHA use only, fields 2Q through 2U. We are implementing right now a protocol that lets people -- or lets PHAs take that survey information and enter it into this field.

And this way you're able to get a really good sample -- a randomly assigned sample of your residents without having to employ a separate survey process. And so this is a way in which we can take the same questions in the baseline survey and use a code to enter the results of that survey into that 50058 form.

So here you can see the same form that we used in the baseline survey, but instead of checking the boxes what we're going to have folks do -- or ask you to do is instead record each of these responses with a number. So for question one, you would enter in one if they have home Internet access or two if they did not have home Internet access.

We can then use that response to sort of reference all of the subsequent responses. And so if you entered in one, you would move down to Q2 and Q3 and then for each of those subsequent checked boxes, you could just enter in a one 1 or a 0, depending on whether or not that box should appear checked or unchecked.

In this way, you're able to encode those responses in a machine-readable format that's also linked to the individual and it allows you to quickly find a baseline for your amp. So if you were to move through that same survey form, you would have all of these sorts of plain-language answers.

You know, yes, the respondent has access to the Internet, they have access to the Internet via high-speed subscription and a smartphone data plan. Then they answer question -- or they continue to respond that they have a smartphone, a desktop or a tablet that they can use to access the Internet.

You would then encode those answers and in this format, 1110 and so on and such. And basically, each field is separated with a space and then each response is encoded with a corresponding number. And that way you're able to sort of employ this survey technique without having to either contract out or to call anyone else to make that survey a reality.

Dina Lehmann-Kim: Thanks, Dylan. And everyone, there will be an opportunity to ask questions at the end if you have questions about anything that Calvin or Dylan covered just now. So I'd like to now turn it over to me and I'll talk a little bit about how you can use your survey data to talk about the success you're having.

So as we heard, surveys will tell you where you are, what's the status of say, connectivity in your community. It'll also tell you what your needs are and if you continue to survey, it'll tell you the type of progress you've been making.

So for new communities, you could use your survey results to better understand what your needs are and therefore, which local organizations you should approach to help fill those needs or other -- even our national stakeholders that we work with.

For existing communities, if you've done another survey, say, after year two and you've seen an increase in the number of connections, you could use this to showcase your success and this slide shows you how you can showcase your success through newsletters, for example. Many PHAs have monthly newsletters and that would be a great way to do this.

Blog posts, you should think about blog posts if you haven't done that before. It's an easy way to show your success and highlight how residents are doing as well in a fun and easy way. If you haven't thought about social media, you probably should, especially since this is a tech program. Do you have a Facebook page? If not, you probably want to create one.

Do you have a Twitter account? You know, use social media to your advantage. And you should definitely be updating your PHA's website. I think residents probably go to that pretty often. Stakeholders or local organizations probably visit your website as well. So that would be another great place to feature the work that you've been doing and your successes.

And if you haven't thought about video posts, you might want to do that as well. You know, we always like to say that pictures are worth a thousand words. So something for you to think about.

And one last thing on this slide, remember that your successes can be used to both recognize and thank your partners, which is really important to helping them stay engaged and to continue to understand the importance of the work that you're doing together. So what are the best practices for putting these types of written products together?

First, do a brief background about your ConnectHome efforts in your community. Never assume that your reader knows the full history or even what ConnectHome is.

And another point to consider is to highlight residents their profiles with a short summary of their backgrounds and a brief description of the challenges they face before they came to ConnectHome, how ConnectHome helped them overcome those challenges and their successes and positive impacts that ConnectHome has had in their life.

Residents really are the heart of the work, they're the why we do this and they pull at our heart strings. So whenever we write stories, we really -- I think they're much more effective if you can highlight real-life examples. And then you can end your piece with a call to action for both your residents and stakeholders in your community.

So this brief outline here, I think, is a really good way for you to think about writing your pieces. And just to sort of piggyback on what Calvin and Dylan were talking about, we wanted to sort of drive this point home about best practices for survey administration.

So recruit trusted community partners, really use your resident councils, people who are trusted in your community, local nonprofit staff who work well with residents and use a multidimensional approach.

If you're not getting good numbers and good returns in your surveys, you might want to do the door-to-door approach. Of course, it's more time consuming and it's more difficult, but in the end, it'll really pay off. Certainly, telephone as well. And you can even think about doing a hang tag where you would hang the survey on people's doorknobs.

You can also incorporate your survey as part of any community building efforts you have, outreach events, like sign-up events with ISPs. Comcast has done several outreach and sign-up events as has AT&T and other ISPs have done that. If your ROSS or FSS coordinators do job or health fairs, incorporate that as well.

And then you might even want to get creative and create a competition within the targeted community for survey completions. So these are some things that you can think about in terms of administering your survey.

So now I'm going to turn it over to Jada Johnson who is with the Metropolitan Housing Alliance and is the ConnectHome lead extraordinaire there. So Jada, take it away.

Jada Johnson: Wow, thank you very much. I do appreciate everyone's time today and I am very excited about being a part of the ConnectHome pilot program and now a huge initiative. I'm going to talk about a few things that kind of take us away from surveys, but then back to surveys and it has to do with resident assessments.

We always want to know why did you even engage yourself in with a resident assessment? One of the reasons I believe a resident assessment is necessary is it gives you an opportunity to have a snapshot of the full resident need in all of your site locations. You'll find out about the service, the education, equipment.

Anything that involves an overall view from the resident's perspective is what you'll be able to obtain in a resident assessment. What is the motivation to have in that assessment? Well, an assessment itself can help you further articulate to your partners in a community what exactly the residents need beyond the technology piece.

How would we incorporate the assessment into other activities for the PHA when they're taking part in these things? How we incorporate it is we actually take some of the key items. It all depends on what our focus is at that time.

But we take specific parts of an assessment and we use it to gauge and leverage for different activities that may include grant activities, that may include partnerships in the community, that may include the opportunity to, once again, engage and educate residents that are staying in our sites.

Some of the questions that we ask with our assessment has to do with what are our residents' transportation needs, what are their medical needs, what are some of the education needs, childcare and of course, digital literacy is our number one focus for this program.

But to have a full understanding of some of the needs throughout our resident environment is a great tool for us to use not just for our purpose, but to also allocate budgets that we will be needing for the residents moving forward with the ConnectHome program. And one of the things that everyone asks me is how often would you have a resident assessment?

An assessment is usually obtained by a third-party entity. So the assessment itself is usually done maybe annually, but say, for instance, if you wanted to incorporate your surveys to gauge the information that you obtained from your assessment, then you may want to do the survey as often as you possibly can.

I take surveys with me on every event that I have, because I want to make sure that I meet my goal to have 100 percent of our residents connected and having a survey at each event helps me to understand where I'm at in meeting that goal.

When we come to using or participating the residents in a Section 3 program for the ConnectHome initiative, everyone asks, Jada, where did you get your funds from? One of the ways that we were able to incorporate Section 3 funds, of course, I work in the capital fund department, is that we have a list of residents that are signed up for training programs.

Well, what is ConnectHome? It's a training program to educate our residents on digital literacy and then also, self-sufficiency and potentially obtaining a job. And one of the things that I needed help with along the way was having the residents to kind of aid me in different jobs throughout the process.

So I was able to pay our residents through our operating funds for public housing and we have a small fund for capital -- in our capital fund that I could use for training programs too. So that's how we kind of expanded the use of our Section 3 to help us with our residents to disseminate surveys and data entry and planning activities, things like that.

And it also, in the end, helps the residents see a huge buy-in. It helped us with our buy-in when the residents were actually helping me to deliver the surveys door-to-door. Also, one of the things is I wanted to bring to everyone's attention is training. Training is key and how do our residents get trained on being able to input information into a computer and things like that.

It took time away from ourselves to be able to train the residents, but the end result was having a resident go out and get a job. So it was very helpful and it makes for a great story. What are some of the benefits of using the resident? I'm telling you, when I initially use the residents, it was like how am I going to be able to pay for this and how will I be able to give back to them?

Most of them, believe it or not, they want to participate at any level if at all possible. What I've seen from the resident groups that were already formed was a committed group of folks that really wanted to help follow the program.

So as they were committed and I talk to my partners about having residents help me disseminate surveys and do things like that, I was able to kind of award them when I had my early wins. One of our partners was able to give out a couple of free computers.

So I was able to take those computers and make sure that our residents that helped me in the process were able to obtain those for free. Some of the early -- some of the benefits for the residents were they were able to receive stipends and additional training opportunities. It helped with our sustainability at some of our sites.

They still ask me about additional training. And also, I'm able to move the whole ConnectHome outreach into a job training and outreach program too, which is a part of success for our initiative. When I looked at tracking our information, one of the ways that I was able to do so is of course, by our surveys, but then we were able to pull some ISP statistics from zip codes.

At the beginning of this whole process, that was the closest that we could get, but as we moved forward, being able to individualize the information from ISPs is getting a lot stronger. Also, with the resident assessment, each of the houses were surveyed. So I was able to take that information and then I would include that in my annual report.

Overall, how we attract our survey, we do have an Excel spreadsheet that was given to us by our early group that helped us with it and I think Calvin and his group were able to put us in touch with this survey -- with the Excel spreadsheet or helped to formulate the Excel spreadsheet and then were extremely helpful with that information.

And it's just like they say, you put the information in, you select one, two or three to answer the questions and it was really self-explanatory and very easy to use. And then you can extrapolate the data that you input on there to fill in a report that you may be able use at a later date. How often did I collect the information?

I always try to collect as much information as I possibly can and like I said, on each resident, engagement is really important for us to be able to pull this information. On the next slide, you'll see just a sample of the data collection sheet that I've circulated with any helper that I've ever had and my [inaudible] also has access to this information to take a look at.

And like I said, each one of the questions that is on the survey is on this particular sheet. You have a drop-down menu where you can select one or two. Saying one means yes and two means no and then it takes you to the next question.

So it's easy for you to disseminate the information or allow a resident to be able to guide you -- to guide them through the process of inputting the data, which I felt was extremely helpful. And I will now now pass it over to Meggi [ph]. If you have any questions, we'll wait until the end and I'll be more than happy to answer any questions.

Dina Lehmann-Kim: And before Meggi starts, I need to say that she is also a ConnectHome lead extraordinaire for Rockford Housing Authority and we're very grateful that, Meggi, you could spend some time with us today. So please go for it.

Meggi Aspengren: Absolutely. Thank you so much. So what I'm going to do is kind of open this up a little bit more. I'm more of a visual person. So I thought having examples would be very helpful. So I'm going to discuss just a little bit about the platforms we use, how we use it and what it can do for you if you choose to go that route.

And then I will provide you with some direct examples of how data is analyzed and what it can tell us and what we've been doing here in Rockford for that. So to start, our main process for enrolling individuals and -- you know, we're surveying residents through our intake application.

And so we use Google forms for the application and this is a great platform for us in the sense that whenever we receive somebody that fills this application out, we get an email directly to our digital inclusive coordinator, our Vista coordinator and then it comes in PDF form. So then she's able to kind of see a full application with all of the questions answered.

And so we have all residents complete an intake application. That email comes across, we get alerted of that. And then what's great about Google forms is that it provides real-time data in the form of graphs for ongoing data analysis. And I will show you towards the end of my slides here just a couple of examples of what that data might look like, because I do think it's important.

A big piece of this that gets overlooked a lot of the times is really analyzing the data that you have and with those that are on -- boots on the grounds, it's hard to keep up with a lot of that. So it's really important to have a system that's able to track that for you.

And then what's also great about Google forms is that it then can export data from its database to a Microsoft Excel spreadsheet for usage to where you really can analyze the data and kind of manipulate it in the way that can help share your story, share your data to the public, to the community and anyone else interested.

So on the other side of things, we also use Microsoft Excel and this is where we keep our actual database, if you will, of all individuals that have come into the program and it can be imported straight from Google forms. We kind of have our setup and I'll show you an example on the next slides here.

We have our setup to where it's just a little bit more organized than what Google forms can give you and that's really up to you if you choose to go this route again. But as long as your information is organized and you're able to navigate it, that's really all that matters.

And then what's great about Microsoft XL is that it can set up formulas to populate certain data points and areas to, again, analyze that data. So tracking it, what data is needed to track? And I know in some previous slides, we've covered some of that, but I would say what we really focused on was your basic demographics, of course, your name, your address, the sex.

So we knew where participation was coming from and then programming information, are they already enrolled in some of the other programs that we have offered and if not, that could be a way for you to streamline some of your efforts together, especially with your resident services department if you have it set up that way.

And then with digital literacy information, so where do you see their digital literacy level? We have just a simple one to five scale, one meaning an individual has no computer skills and five meaning that they're an expert on the computer. And again, I'll show you that coming up.

But what are they going to be using that computer for then? And are they going to use it for school, for looking for work? Are their children going to be using, are there children in the household?

And then we go a little bit further -- a step further, because of our partnership with the local library and see if they have a library card, because there's a lot of other opportunities available online and because this is a digital program, it's important that you, again, try to streamline as much as you can to not make more work for yourself or make it more complicated for individuals to participate.

So how do you analyze your data? How many applications are submitted? How many individuals are connected to Internet service? How many are enrolled or have completed your digital literacy classes? And then who are the Internet service providers? I know here in Rockford, we have only two providers.

And so that's an important indicator for us to know who they're working with so we know what options are available to them.

And then here you'll see a prime example, this is the first half of our database from Microsoft XL and it was similar to the one that Jada showed prior, but it will show you the basic information and all the different things that I indicated that we were kind of tracking. And so you'll see here we've got spots for Internet service, digital literacy and then if they received a device.

We're tracking did they receive a device and we don't keep this information to track the computer. Once we get rid of devices, that's the resident's and the resident's to keep, but it's still important information just to make sure you know where computers are going and just staying organized with it.

So here are just a couple of examples on these next slides. So you'll see one of the first questions, what is your current housing location? To us, that's very important. We want to know where participation is, who's participating, are they a senior, are they a family that has children in the household and what are those needs of that family?

And what's great about this is it's coming directly from the Google forms and that you'll see that it'll show you, as long as you put your sites in there, where your participation is coming from. And then do you currently have a working computer or laptop in the household?

And this here will give you a simple pie graph and break it down for you as to yes, no and then what their status is from there. If you do not currently have a working computer or laptop in the household, why? Those are good indicators for us to know, because if it's too expensive, great, we have a partner that can address some of those things for you.

If you don't know how to use a computer, great, we have digital literacy classes that we would love to enroll you in to help you understand the computer and navigate the computer a little easier, gain some skillset there. And then if you say -- or if you have a -- do you currently have Internet service at home?

And we gauge it by not having a cellular device. We're talking an actual device that you can access a computer, a laptop, a tablet. Do you have that service at home? And you'll see there the majority of our residents do not, which is a good problem to have in a way, because that's why ConnectHome exists.

And then if you currently have Internet service, how long has your service been connected? And so this will kind of tell us if people have been connected for long-term timeframes or if they haven't, what those reasons are. We can kind of engage with that resident a little bit more. And then how would you rate your current computer skills level?

As I mentioned, we kind of had a one to five scale and this, to me, is probably some of the most important data that we can track, because this also lets the residents kind of assess themselves rather than us just assessing them to death. So they get to tell us where they feel their skills lie. So then that way we can kind of coordinate with our partners to make sure we're getting them in the classes that they're going to enjoy and also be successful in.

So the last two here, if you participate in digital literacy, what are you interested in learning? That's an important part to us to continue to improve and build on our digital literacy practice, because although we have classes up and running, times are changing, you guys know technology changes. And so it's important to stay updated on that information and make sure that you're staying updated on the information you're getting from your residents.

So you'll see in here a big indicator that -- some of the things we had was basic computer skills, Microsoft Office Suite, uploading documents, email and then you'll see the majority of the response is they want to learn all of it. And so that is where -- that tells us that people are interested and we want to continue to put momentum behind these classes.

And then how do you currently use your device or what will you use your device for in your home? And so you'll see here is I mentioned that question earlier on, but employment, job training, entertainment, school. Whatever those reasons may be, this is a great way to capture that data.

I'm freezing over here, hang on. So how do you keep the work moving forward then is you're going to have challenges along the way. I'll be the first to sit here and tell you that it's not an easy process all the time, but if you get the right -- if you set up your platforms to work for you, it makes the job a lot easier.

But just also understands that what works in one community might not work in other communities. And so it's important to remember that you do need to assess your population to find out what works best for you, what the needs are and also know that there's so many resources and organizations out there to support you in these efforts.

So don't be afraid to reach out and address needs and challenges so you can develop solutions and continue moving forward with that. And so some of our things is we really -- some of our challenges were what did we want to track in the first place? And so we really talked through a lot of that is what's important for us to know for this so we can continue to grow this program?

And then just making sure you're staying on top of the work. It is a -- you know, the work can get busy. We have some heavy participation in ConnectHome, which is a great problem to have, but it is important to just make sure you're saying up-to-date and you're inputting information timely.

And then also, if you are using more of -- we had some challenges of manually inputting information for a while, because we were in the middle of a housing database upgrade. And so we were right in the middle of transition.

And so we were doing -- tracking a lot of data by hand in the beginning and what we are moving towards now is using our housing database to be able to develop templates to track that data for us. So make the process a lot easier where we could input less information and get more information in return. And then that is all I have.

Dina Lehmann-Kim: Thank you, Meggi, very much. We really appreciate it. It looks like we have about 12 minutes now for Q&A. So it looks like there are some questions in the chat box right now for Calvin and Dylan.

One question is, "Could we have access to the insight policy spreadsheet?"

Calvin Johnson: Which question is that?

Dina Lehmann-Kim: Maybe it's more for Jada, this question.

Jada Johnson: I do have -- I can send that out. I've actually sent over a copy to you all too. So I can resend it and we can send it out to the group or if anyone wants to email me at Jjohnson@mhapha.org, I'll be more than happy to get it to you.

Dina Lehmann-Kim: Great. Thanks a lot. And then another question is, "What is a good sample size?"

Calvin Johnson: Yeah. So that's a common question. And I'm going to give an answer that sounds like I'm going to evade the question, but it really just depends; right? So it all depends on the size of your population. If indeed -- so let's give an example. A rule of thumb is that one, you definitely want to have --

And this is a general rule that I learned, this is a quick way, if you're not really interested in developing a point estimate, a confidence intervals around of which I don't think that that's what you want, then if you have a population that exceeds several hundred, then a sample of 100 is fine.

If you have a population that's less than 100, the question really is should you just capture information for the universe? So for everyone. Or should you just take a sample of them? I think that it doesn't matter, because the sample is a lot smaller. It just depends on how much effort you want to exert.

But I would say that there are calculations that can be run to actually determine what the appropriate sample size is, but I would not get caught up on trying to understand the actual statistics behind what that sample size should be.

So while it sounds like I'm punning, it's -- it really just depends on how large is the population, what are the types of questions you are trying to answer, what is it that you already know about the population and the outcome that you're trying to measure, just a number of those things.

But I would say, again, that if you have several hundred in your population, sampling 100 is always a good rule of thumb as you approach a much larger sample.

So as your samples get into, let's say, 1,000, which in some cases, housing authorities will have populations they're targeting that are in the thousands, I would say you'll want to talk to your research partner and really go through a set of questions that would help you determine the sample size.

If your population is less than 100, you probably will be better served just trying your best to survey as many of them as possible. You'll probably spend more time and energy trying to determine what is an appropriate sample than it would take for you to go through the process of really just trying to canvas those 60, 70 or so households and get back the survey responses.

Dina Lehmann-Kim: Okay. Thanks a lot. Oh, it looks like there's a follow-up question. So it says more specifically, "So our population is approximately 10,000, both LIPH loan -- public housing and HCV. Based on that, how many would be a good sample for us to gain a good baseline?"

Calvin Johnson: Yeah. Now, that's when I'd say you probably would want to engage a research partner. You have 10,000, you might -- so there are questions that will come to mind for me is what is it that you can tell me about the 10,000? Are we talking about 10,000 they all look the same? Are we talking about 10,000 across different types of properties?

Do you have family, senior properties you're looking at? Do you have scattered site properties? Are we talking about properties that are like developments that are tightly clustered? So those are the types of questions that I think would be necessary to talk through your research partner with. The more -- the larger and more complicated that population is --

So the larger the population and now we need to start thinking 10,000, we're probably not talking about 10,000 in one concentrated area, we're probably talking about 10,000 spread out across the city. The stock of the housing may look different. You may have multi families scattered, you might have developments that are tightly clustered.

So you need to start thinking through those issues and then determining what is the appropriate sampling technique. It's not complicated, but I couldn't answer that without having a lot more information.

Dina Lehmann-Kim: Thanks, Calvin. I don't see any more questions in the chat box. Does anybody want to ask a question over the phone? You can raise your hand. If not, I will ask some questions for Meggi. Two questions.

"When you talk about applications, were you talking about applications to participate in ConnectHome or were you talking about applications for public housing?"

Meggi Aspengren: I was referring to -- we have our own intake application for ConnectHome. However, one of the things we are looking at is what was mentioned earlier on in the presentation is to kind of streamline some of that with our recertification process as that happens annually for every resident.

Dina Lehmann-Kim: Perfect. And my follow-up question is, "On the data that you showed, which was really interesting, once you have that data for a resident, do you go back to that same resident a year later or, I don't know, regular intervals to see how they're progressing?" So let's say they said they were a one in terms of their digital skills, how are you going to find out if they get to a five, say, or a three?

Meggi Aspengren: And that's great. That is something we're really talking about a lot now, but what we have agreed upon is that we would like to follow up at both three-month interval and a six-month interval. So six months out really touch base with that person in hopes of kind of gauging are they still participating in classes, what's kind of their status.

And so we're trying to set that up as we speak now, but really, our process would be to at least engage with them after three months.

However, if that resident is in one of our FFS programs and is receiving that ongoing case management, then it would be really to work with that case manager to kind of stay in touch and see if there's anything that we can do to support along the way if they're wanting to get into more classes or whatever that may be.

Dina Lehmann-Kim: Great. Let's see, now I have another question in the chat box. "Is it common to divide your target population into two phases? For example, phase one, public housing residents and phase two, HCV residents?"

Meggi Aspengren: I can answer that, this is Meggi, if you're looking for an answer there.

Dina Lehmann-Kim: Sure. Go for it.

Meggi Aspengren: I think for us, we didn't divide them by public housing or HCV necessarily, but on that -- if I can go back -- I don't know if I still have control over it, but if I can go back to here, let me see, right here. So can everybody see it on the screen okay? Did it move?

Dina Lehmann-Kim: Yes.

Meggi Aspengren: Okay. So you'll see on this page here where it says under site, you'll see some highlights of green and some yellow on there. And so we didn't separate people by housing towards voucher, public housing, senior -- you know, if they're senior sites. What we did is we kind of color coded.

And so green would stand for a public housing resident or a family site for us, yellow would stand for a senior and then we had like a magenta color, which you can't see on here, but a magenta color that represented our HCV residents.

And so we didn't separate them in any type of process, but we just -- we did make sure that we indicated that on there so that way if we did need to pull that data, we would know how many we had in each area.

Dina Lehmann-Kim: Okay. And that's helpful. Calvin or Dylan, do you guys have any thoughts on this, on whether it makes sense to first target one type of population first? So public housing first in terms of doing a survey and then phase two, a HCV residence?

Calvin Johnson: No. I mean, so it's just based on -- so if you remember, if you go back to one of the earlier slides, that kind of circular flow chart, one of the things that you might want to think if your strategy is that we're going to target public housing, because it's probably the lowest hanging fruit of your portfolio, then that's a decision that you would make locally and I don't see anything wrong with that. -

I would probably hazard to guess that public housing is probably -- I mean, if I were going to go about this, I would probably focus on public housing as my first priority and the only reason being is because you have -- depending on the type of public housing. So if we take scattered housing out of it, if you're living --

I mean, if you're in an area where you have developments that have a large number of units, you're going to exert less effort in terms of drive time and just trying to coordinate all of the activities than you would if you were targeting your HCV households and your scattered sites, in many cases. And so I wouldn't say that you would target them first, I just think that you would want to think through what your strategy is for connecting as many households as possible.

And based on the experience with the pilot communities, it just seemed that the target was on public housing first for that very reason and in many cases, it was, I think -- it was easier to kind of get a lot more of the additional benefits beyond just connecting households as well. So you had things where some of the ISPs were willing to create hotspots in the lobbies or in areas just outside of these buildings. You had ISPs that were willing to host digital literacy training onsite, because there was also a facility onsite within the buildings to actually do that.

So I think that it's just based on whatever your strategy is, but I wouldn't necessarily say that you need to think about it in phases without saying, if your strategy says that your phase one approach is going to be the target, public housing, and then target HCV, then that makes a lot of sense.

But I don't want to come across as if yeah, you should always think about public housing first as it relates to this type of effort and then HCV. It just really depends on kind of how it looks within your jurisdiction.

Dina Lehmann-Kim: Thank you. That makes a lot of sense.

Jada Johnson: I would like to add.

Dina Lehmann-Kim: Yes. Go for it, Jada.

Jada Johnson: Because I had -- I actually did an outreach for all three communities, which included public housing, affordable, mixed finance and HCV, it is easier, I do agree, for the public housing residents, but if you do want to -- and I did keep them separate, because I needed my numbers to show separate numbers because of the budgeting dollar amount is actually separate across the board.

So for affordable, I went in as one of the first communities along with the public housing and the affordables are so large it will take a little bit more of your time. HCV is a little bit more scattered.

We don't have as much control over the HCV, but one of the things that I can recommend is focusing on their groups that are already established, like the family self-sufficiency group if you're targeting the HCV.

Dina Lehmann-Kim: That's great. Did you find similarities in the results across those groups in terms of like their needs or their --

Jada Johnson: Believe it or not --

Dina Lehmann-Kim: Mm-hmm. Sorry, go ahead.

Jada Johnson: No. They were very different. They are very different. The affordable housing units match the environment, believe it or not.

So affordable, you have public housing Section 8 and mixed finance development living in one location and I found that in those sites, which I focus on public housing within the affordable community, those -- the residents were a lot more advanced, believe it or not. So it was a different group who had a different group of folks to work with throughout the whole process.

Dina Lehmann-Kim: That's really interesting. Well, we're at time and I want to thank all our wonderful participants for taking the time out of their busy schedules to share their experience and expertise with us. We are always available to answer additional questions. You can send questions to Connecthome@HUD.gov if you want to know anything more about what we covered today.

And I'd like to thank everyone for participating and we look forward to hosting you on our next webinar, which will be in early January. And I look forward to talking to you then. Thank you so much.

Meggi Aspengren: Thank you, guys.

Jada Johnson: Bye.

(END)