Elevating Lived Experience in Coordinated Entry Evaluations: The Role of Qualitative Data

0:00:02 Andrea Miller: But we're here on the other end and why don't I give it just another half minute or so and we'll get started.

[pause]

0:00:30 AM: Okay. Let's get going. Hi, everyone, my name is Andrea Miller. I am an HMIS consultant and practitioner. I've been working with HMIS data for about 15 years now, have always, along side of that work, conducted and worked on evaluation projects as well. So today, we're going to be sharing with you information about that, how to integrate and elevate the voices of folks who are most impacted by homelessness into your coordinated entry evaluation projects. I'm joined today by my colleague, Kat Freeman who is going to be able to share a recent experience she had with us regarding focus groups.

0:01:22 AM: So, let's get going then. The concepts we're going to explore today include understanding how to include qualitative data in your framework, becoming familiar with both qualitative data collection, strategies and processes, as well as some qualitative data analysis techniques. And also, we're going to take a look at some tech options that will help you potentially automate or, at least, create efficient ongoing feedback processes within your CoCs, if that's the sort of thing that you'd like to explore.

0:02:00 AM: We have a lot of content to cover and so, I've provided a guide for you. You're going to be seeing a lot of guidelines in this presentation. I've wrapped it all out in a quick guide and I'm also going to be uploading two field guides for you, especially, with regards to the tech options. There are a couple of things out there that are really nice resource list, long lists of products and platforms and even provide points with regards to various tech-type options. Our animating concept today, of course, is we hear you, we hear you, folks, who are receiving our services and we want you to be part of the conversation. So, the agenda is to demonstrate how you can choose strategies, again, then, how you can collect your data, analyze it and finally, streamline some of your processes.

0:03:00 AM: And lastly, one more interest slide, I guess here, we have a really wonderful set of reasons, right now, to include qualitative data in accredited entry projects meaning the voices of folks who are impacted. We know that HUD now requires us to conduct an annual evaluation of accredited entry and requires that we solicit feedback from folks, both providers and folks receiving the services.

0:03:27 AM: We know that when we include the voices of folks who are impacted, we actually get better and more actionable data. I heard a wonderful quote yesterday from somebody who said that the people who are closest to the problem are often the people who are closest to the solution. So, by including the voices and sentiments and perceptions of folks who are impacted, we can truly improve our own services and lastly, it allows us, of course, to honor our principles and practices regarding diversity, equity and in conclusion. For our reading pleasure, some more information about those concepts and let's get going.

0:04:13 AM: I'm going to review with you, four strategies to use with regards to collecting qualitative data. There's more than that out there, of course. I'm going to be focusing on narrativedriven strategies, right strategies where we're collecting our info from people through dialogue and even open-ended questions on surveys and then, having access to that data initially as text.

0:04:38 AM: There are actually visual analytic strategies and even kinesthetic strategies that people and evaluators use as part of an overall qualitative data approach. Again, for us, we're mostly looking to augment and improve our process of analyzing data within accredited entry so, we're sticking with these four things starting with semi-structured interviews. If for our purposes, the best strategy there pertains to key informants. The key informant interview is seeking out leaders and and practitioners, program managers, [0:05:14] ____ that in that way who can share insight with us about both straight and limitations of the system and so on.

0:05:23 AM: A nice strategy here is to create an interview guide where you have, at least, four or six, maybe eight topics that you're going to be talking about and yet, allowing the conversation and dialogue to evolve naturally and to go where it's going to go. Some guidelines here include talking to about 15 to 35 people with regards to key informants. This is a guideline within the field of evaluation. I've never talked to that many key informants. So perhaps, this is aspirational and/or, it's something that maybe you want to scale, based upon the size of your CoC. I'm often satisfied if I can talk to five or six folks. Five or six folks located in different locations within the system and can share their perspective with me. As I mentioned, you want an interview guide going into it. You want consistency throughout the conversations.

0:06:22 AM: And lastly, these things are tools where you could actually record the conversation and gain access to and transcribe it through web-based tools which are, by the way, in that research guide that I mentioned.

0:06:38 AM: Using key informant interviews are a great strategy if you're still in sort of the formative stage of your project, in this case, if there are still moving parts with regards to your coordinate entry program, if you're still working toward best practices, they're also good if you end up identifying specific issues that are telling you that your activities, your processes, your outcomes are moving in the wrong direction, that's a good time to get on the phone or to sit down with folks who are key informants.

0:07:11 AM: The next strategy is focused group. I'm sure you've all, of course heard of focus groups, maybe you've run some focus groups. Our guideline here, is to conduct at least three to four focus groups, ideally six to eight people. Maybe it could be larger, when it gets very large, it [0:07:28] ____ into what is known as a listening session, you may have even attended some of those, the same principles apply here, is that you want to go in with an interview guide, right? And you also want to go in with a note taker, someone different from you. If you're the facilitator, you need somebody else who's actually taking all of the notes. And this strategy is really a terrific strategy, when things are being implemented and you want to know how services are truly going. Part of what happens in a Focus group is that peers themselves are sharing information with each enter and that can really foster a nice amount of dialogue.

0:08:15 AM: Then of course we have surveys, but in our case we're thinking about surveys in so far as they include open-ended questions, and that would be a practice that I would encourage you all to implement. You probably... Or I would guess that many of you would be using surveys as part of your coordinated entry evaluation. So to make sure that you have either follow up questions, open-ended follow-up questions within that survey or even just general open-ended questions, is a really good strategy. Now rule of thumb if you're using surveys, as part of your evaluation, you probably want at least 250 of those surveys. Now, that's probably a stretch. Here too it can depend upon the size of your CoC. Another way to think about it would be you ideally, you'd want surveys returned from 40 to 60% of your coordinated entry participants. Another real trick here is to keep the survey sort, much shorter, probably, than you'd want. You want to keep the survey to five to 15 questions, including the demographic questions and you want to use best practices when designing the survey questions.

0:09:31 AM: I want to talk about a few of those. So, so here we're talking about general survey items, not just about qualitative or open-ended items, but I didn't want the opportunity to pass without mentioning a few ways that you can improve the questions that you are asking in your survey through good design practices. Here's an example of when we use questions of a different valence, either within a survey or within a group of surveys. You see this first item here, "Were you satisfied with the pace of the housing search process?" And you see how that's flip. It's negative valence on this bottom one, "Were you ever frustrated with the pace of the housing?" It's just a good practice to include some swift switch up of the valence. It also allows you to detect if you're getting responses that aren't actually internally valid. And the other thing I wanted to say here, actually is that, by the way, you see the way that this is structured on the one to 10 scale, it turns out that this type of survey question, especially on things like patient satisfaction surveys, is a much more valid and reliable way of designing a survey question, compared to the more typical three to five-item ordinal scale.

0:10:51 AM: So I said that was an interesting tip, to come across. One other thing about designing survey questions, please stay away from multi-part questions. I see a lot of those out there even related to coordinated entry surveys. So this is an example, were you satisfied with the pace and results of the housing search process. You're asking people two things. Are you satisfied with the pace, are you satisfied with the results. They're only going to give you one response, designing a question in this way actually then undermines your ability to actually analyze and interpret the data that you're collecting. So last thing I wanted to mention here with regards to strategy, refers to polls or micro-surveys, mini surveys, these are ultra short, you've seen them around. But I wanted to mention them because it allows for some really neat in field collection of information.

0:11:53 AM: For example post card surveys are surveys that may only be three questions on literally, a piece of heavy stock paper that's the size of a postcard. It's a really effective technique. I've used them in a couple of projects where we were actually again out there in the field and wanted to solicit feedback from people, and it was really simple for them to take a minute and fill out a postcard and give it back to us right there and then. And we collected lots of really rich insightful feedback from people that way. There's also this really neat thing happening out there with regards to the use of kiosks and even polling booths. I've provided toward the end of this presentation links to a couple of videos where you'll see homeless service providers talking about the use of those strategies to collect ongoing feedback from their project participants. And it's really great stuff and really a great amount of feedback that they are collecting.

0:13:00 AM: Lastly, the other thing to mention here about polls and micro surveys, is it can also be a great way to get ongoing feedback so that you have a sort of early warning system in case something is going to awry out there in the programs and projects that you are operating.

0:13:23 AM: And I lastly, wanted to mention to you that we are formally here talking about a mixed-methods approach of evaluation, so when we combine qualitative data with our quantitative data, again, that's strictly known as mixed message, you may have seen that label out there, and now you may be able to pursue that type of approach yourself. Okay, so let's talk about some strategies with regards to how to collect good data from the folks who are impacted by homelessness. It's important to pause here because we know that there are a lot of things going on for the folks with whom we work, we know that the chaos of homelessness itself can undermine one's capacity to process information in sort of more usual or typical ways. We know that things like serious mental illness and substance use, impaired memory, history of trauma, even poverty itself has been shown to basically reduce the bandwidth that you have available for problem solving. So the idea is, we know that there are barriers to people providing feedback based upon their experience and how do we then work with them to be able to collect that feedback, to truly be able to meet them where they're at. So let me talk to you about some of those strategies.

0:14:58 AM: And these are things, it might go without saying that these are things that you could try out, but they're sort of more art than skills-based, right? It can be hard to connect to know exactly how to connect with people who have a lot of cognitive and even psychiatric barriers, but here are some tips for you. We're going to think about languaging, how to help foster comprehension. We're going to talk briefly about temporal framing and then about how do we just in general, minimize the cognitive overload that might be occurring in these types of interactions. With regards to languaging what's been shown, with regards to working with folks, especially who have serious cognitive and psychiatric barriers is to be concrete, not abstract, to the experiential [0:15:53] **____** a part of what I mean there is, refer to material things, refer to sensory things rather than abstract feelings. Also, it's helpful to use present tense, not past. These things can apply to things like designing questions to foster focus group dialogue or designing a survey questions. And here's a couple of examples of being concrete.

0:16:23 AM: So here's an example of a question that's not concerte, it's a little bit abstract. Did you feel like the housing navigator kept you informed about the housing search process? That's in contrast to this second item, when you had important questions for the housing navigator, did you get answers that you understood? So this is in the, the second one is in the past tense but you see that it's really shifted the scope of the question and it's become very concrete. This question is much more likely to actually be able to be responded to in ways that provide you with good and reliable data. Another strategy here is with regard to fostering comprehension. This applies especially of course, to written documents, even online surveys, a really great approach is to use visual analogue scales. We all see these around these days on social media and that sort of thing. There's lots of examples like these though in things like patient satisfaction surveys for populations of folks who may have various impairments.

0:17:37 AM: I've seen things like ladders where one is at the bottom of the ladder and 10 is at the top and the person circles their response according to where it falls on the ladder rung. I've seen mountains of course. Another thing to mention here is that you want to follow the literacy principles and practices that includes things like images and bold text and lots of white space, that sort of thing. Temporal framing is a really interesting issue and I think that it is really applicable to the coordinated entry process, right? The great entry process has a beginning and an end and things that happen in the middle, and that's what we're trying to solicit information about and hear from people about their experiences, but how do we do a good job with that, especially if, again, they have things getting in their way with regards to their memory or the way that they've organized their memory or even the way that they've experienced the sequenced events.

0:18:43 AM: So let me talk to you just a little bit about two of these techniques, the look-back technique, and journey mapping. The look-back technique is an approach where you help narrow, you help pin down somebody's memory in time and space. So for example, say you were try, say you were asking somebody about when their experience of homelessness started, and maybe it was five years ago or maybe it was like five to 10 years ago, and they really don't know when it happened or they can't provide you with the information that you need right now with regard, with enough refinement, right? So a way of using a look-back technique would be to ask somebody, "Well, did the experience happen before or after your birthday?" You look toward that's something that's really going to anchor their experience. Let's say we use the birthday and they say, "Well, it was after my birthday." Let's say their birthday is in June. You then could ask, "Well, okay, so did that happen in summer or fall?" And then they tell you that, "Actually, it was winter", and then you can ask about, "Did it happen before or after Thanksgiving?" The idea you can see is to, again, sort of help somebody narrow down their recollection, then you have your starting point. The journey mapping is similar. It's a really neat approach, it's new, it's new in evaluation, and...

0:20:15 AM: I guess it's just a very specific description of how can we help organize people's experience, so that they can provide us with concrete and actionable feedback. Here to... It just seems really applicable to the query and entry process, and it's about creating anchors for people along the way. So instead of, for example, asking folks in a focus group like, "What was your experience of coordinated entry?" instead you truly walked them through the process. Right? What was the first thing that happened? Maybe it's assessment. And so you talk to them specifically about assessment and then you talk to them specifically about housing search, and then perhaps housing placement. So the idea is just to be completely concrete, with regards to the process that you're trying to collect feedback about and even visual. So the folks using journey mapping actually emphasize the visual, so even putting up on a white board, or something like that, either images or even something like you see here that can help people organize this experience in their hearts and minds while you're trying to hear about what your experiences were.

0:21:35 AM: And then lastly, hopefully this is sort of intuitive, how do we actually make sure that we're working with folks as partners and treating them as the experts they are with regards to their experience and valuing their feedback? So some nice rules of thumb of course are to keep things short, not long, to provide incentives, that can include gift cards, it can include stipends. And so otherwise again acknowledge people's expert status. So to just a plug, to do things like have coffee and snacks available for a focus group. Or provide incentives for surveys. The work that's been going on with regards to youth homelessness has really educated us all right? About how to use gift cards to help recruit folks into a survey process, and it's sort of normalized that for us. Which is really terrific, because it's definitely the, a perfect strategy to use, it really does acknowledge that people's time is as valuable as our own. So now I'm going to turn things over to Kat. Again she's going to share with us some really neat experiences she had using a lot of focus groups to collect information from a CoC about their coordinated entry process. Kat.

0:23:19 AM: Kat, Kat we're, it's your turn. Okay she is not yet with us, so let me move on. Kat we're ready for you. Okay.

0:23:48 Freeman: Hello, can you hear me?

0:23:52 AM: Yes, I can hear you now.

0:23:53 Freeman: Okay. Okay, I'm sorry for whatever reason, my phone suddenly decided it wanted to drop the call so I apologize profusely to everyone. Okay, so thank you Andrea. Hopefully, there wasn't too much of a delay there. I'm actually gonna talk to you about my actual experiences in conducting some focus groups for coordinated entry. I guess the first thing that you might wanna know is why would I even do a focus group? Right? Is it really necessary? And I guess the answer to that would be, no. But if you think about system performance, what you really should be thinking is, "What am I trying to achieve?" And the answer to that is likely something along the lines to, "I wanna provide fast accurate service to my clients." This is true, whether it's a non-profit or a for-profit organization, right? So it seems kind of logical that you would want to know what your customers think about your services and how they're delivered. They are after all, the reason why you're doing, what you're doing?

0:25:02 Freeman: So your customers really are the best absolute information about what they think works, what's kind of so, so, and what really needs to change and this is also the reason why billions of dollars are spent every single year in doing market research to better understand clients, what they want, how do they feel about things and what's the best way to get them what they want? And if you think about it, that sounds just like the homeless system of care, right? And in particular, it sounds just like what we wanna do with Coordinated Entry, our prioritization scales and referral processes. So the next question then is, who are your customers? So there are really five different sets of customers, the first ones are really easy to identify, right? So it's the clients you're trying to serve. These are the people who are homeless or at risk of homeless and they're are people who have been housed fairly recently usually within the last six months. And they can tell you very specifically how the coordinated entry process impacts or did impact their ability to get housing and services. They can also tell you how they experienced the process, how they felt about it, how they like to see it improve.

0:26:20 Freeman: But they're also not just the only customers for coordinated entry. You also have front line staff. So these are intakes specialists, case managers, outreach workers, these are the people who are trying to implement coordinated entry in accordance for the process that was designed for, or designed by the COC. This customer type, can provide real life experiences about how they experience the coordinated entry's operational and policy requirements. In other words how does the process work or not work, in real life? And they can tell you what works, what they needed to create for work arounds and what doesn't work at all.

0:27:08 Freeman: Then you will also have program managers and executive directors, these are the folks that are managing the frontline staff, they're trying to make the coordinated entry process work within not just what HUD has for requirements but also their own mission and their own boards guidance, they're concerned with regulation compliance, high-level program performance and they have customers of their own to think about, their own board for one, this customer type can tell you why certain things work or don't work from again, a co-operational and a policy perspective, they were the ones who are hearing the pin points from the frontline staff that are trying to follow the process and how it feels to serve or not serve the people they see every day, they then look at these pin points and translate them into policy issues that need to be altered or removed or can simply be changed by the CoC.

0:28:07 Freeman: Then you also have your community champions and visionaries so this customer type is a completely different kind of focus group, they are people who are dependent on your CoC and its information to help guide their decision making process and help them influence community-wide solutions to homelessness so the CoC's ability to provide reliable, timely and helpful information is actually a service to them so this group can tell you how a coordinated entry process is impacting other community efforts to resolve homelessness as well as help you understand what aspects of the coordinated entry process are working well, not working well for the community as a whole and so you're probably thinking, okay, this is interesting Kat but where are you going with it, where I'm going with it is these become your focus groups, these customer types will give you bottom to top information about how the coordinated entry process is experienced operational wise and how it impacts the community as a whole.

0:29:19 Freeman: This is the conceptual background of why I developed this kind of a focus-group strategy when I was doing some evaluations of coordinated entry, it's all about perspective and every one of those focus groups will come at your coordinated entry process with a different perspective so each of those perspectives will have their own ideals and their own experiences with how the system works, how effective it was, how efficient it was and more importantly how to improve it and every single one of those perspectives is going to be invaluable to you in trying to figure out how to make changes and refine your coordinated entry process.

0:30:00 Freeman: So let's talk a little bit about each focus group and how best to design it. You've already heard from Andrea some things around different kinds of strategies and those sorts of things and those definitely come into play as far as my experiences were concerned. So a couple of important things, first of all the community should be responsible for all focus group recruitment not the outside evaluator. There needs to be an objective an involved person to take notes that's really important. It should be noted that dissipation in all of the focus groups should be completely voluntary. Focus groups should have no more than 10 people. Andrea quoted a little bit different thing but what I found in particular with the folks who were housed previously or who are still homeless if you kinda had to ask more people and then you've got a smaller number of people that actually participated so for previously house what I did was we had the organizations to whom referrals were made for parent housing resources identify one to three potential customers or participants, we used the flyer to standardize the information about the focus group so that everybody got the same information about what we were trying to do and then we also offered payment to them for their time and we did this via a gift card.

0:31:31 Freeman: For those who were still homeless we actually selected randomly from the by-name list, we then recruited shelter staff to talk to the potential participants to gauge their willingness to participate, we also provided lunch as a participation incentive and we offered payment for their time just like with the others via a gift card. Then for the intake case manager and the outreach focus group and the program manager and the executive director groups we used pretty much the same methodology of getting representation so we issued a blanket invitation for each organization to voluntarily participate, the organization had to choose their own representatives and communicate that directly to the CoC coordinator about their interests.

0:32:29 Freeman: We then limited the number of representatives for each organization to one, one organized one person per organization and that was to ensure proper balancing of the provider perspective, then for visionaries and champions that was completely self-identified and was balanced by the community itself. I set a limit of saying I don't want any more than 15 people in the room otherwise it's gonna be unmanageable but it was really interesting how the community was able to self-identify who they thought would be the best people to actually come to that particular focus group, in the end we ended up with about 15 people, they were community people with state government funders and we also had a person who was just merely a citizen who showed up to participate.

0:33:26 Freeman: So when it came to implementation, and I just wanna say there is, by the way, in case you haven't ever done evaluations before, there's a really big different between what you plan on doing, and sometimes what happens. So... And this is what is gonna, this little adage is going to kinda demonstrate that for you, I hope. So I came to all of the focus groups with a very specific set of questions that were created, we created them from a research perspective, we wanted it to be a really good, solid methodology. We did like Andrea said, we asked one question, it was one thing they needed to answer, it wasn't more than one concept in any particular questions. And some of these questions actually overlap from each focus group to the next one. And that's where I learned the first important lesson of focus groups that involve homeless or formally homeless, pre-designed questions do not work. Don't get me wrong, you totally need to know what you wanna learn from each focus group and you should articulate that before deciding you want to involve that kind of a focus group, but the questions in the end were written using terminology the clients didn't understand.

0:34:44 Freeman: So lesson number one, use terminology that is familiar to the focus group participants. What I ended up doing was just allowing the participants to tell their journey on how they gained housing within the community. It was up to me to ask clarifying questions obviously, in layman terms, that allowed me to pull out and understand what I needed to learn about the coordinated entry process from the homeless and formerly homeless perspective and then translate that into terminology that COC would understand. And that's also where I found the second lesson learned, you really need to understand not just the coordinated entry process itself for the community, but the organizations that are involved. This is because, as clients told their stories, they spoke in terms of what organizations they saw, who they spoke to, when they spoke to them, the locations of buildings. They didn't speak in terms of access points, or assessment workers, or the prioritization list or by name lists, they had no concept of what those things were. So you obviously couldn't ask a question about do you think we have the right kind of prioritization criteria?" Right? So allowing them to tell their story allowed me to take some of their concepts and really think about how to translate that into what we would be looking for in a final report.

0:36:22 Freeman: A third lesson that is actually quite specific to people who are still homeless; Don't use a person to conduct the focus group, that the group might be familiar with. And this is why. Don't use an intake worker, case manager or outreach person to whom the people are familiar as the person that conducts the focus group. I found that even though the still homeless focus group, people did not know me, didn't know me from a hole in the wall, they all came to the meeting with some kind of a preconceived idea that by participating, they would move up the ladder in prioritization and be able to get housing. And if they have that impression with me, someone that's not even from their community, then that expectation is gonna be a lot stronger if you use somebody who's local, easily recognizable, to conduct that focus group. And that is just simply not fair to the focus group participants. The other focus groups were more familiar with the HUD terminology and so I was able to use the pre-developed questions a little more precisely, but there was still some lessons to be learned here too. The intake caseworker and outreach worker and the program manager and executive director focus groups had the identical questions. And in each group, the groups were asked, "What does phrase coordinated entry mean to you?

0:37:51 Freeman: What was really interesting is the answer to this question, pointed out the disparity in everyone having a common understanding of what the coordinated entry was, what it encompassed and how it was supposed to work. Participants were asked to identify challenges and barriers that related to the coordinated entry, and then were asked to assume a solutions oriented attitude and discuss ways to overcome and resolve those challenges and barriers. All of the focus groups, I mean out of all of the focus groups, the intake worker, case manager, outreach worker focus group by far had the best understanding of the coordinated entry process and how it was supposed to work, what it did and what it didn't do well. They also by far had the best suggestions and the most suggestions for improvements. In the visionary and community champion focus group participants were asked to identify their goal in the community, what their vision was for coordinated entry, and the most important thing that they brought to the table to address that vision. And in the intake worker and... I'm sorry, like the intake worker and program managers focus group, it became really clear that the understanding of the coordinated entry system was not consistent.

0:39:12 Freeman: So let's talk about some of these lessons learned, right? 'Cause you can do evaluation and you can learn things from the technicalities of methodologies, but there just some things that are not tangible and you really need to hear a little bit of experience. So one of them is conduct your focus groups in order. Go from people who are still homeless, to people who were previously homeless, people that you housed in the last six months, go to your intake workers, go to your program managers and executive directors and then talk to your visionary. And the reason for that is, it allows you the opportunity to do the second lesson learned which is use information from a prior focus group to reply in the questions for the following focus group. It was really a powerful thing to be able to use comments obviously de-identified, the comments and concepts that the people who were experiencing homeless, or had recently experienced homelessness, had to what some of the discussion was the people trying to implement it.

0:40:25 Freeman: This again brings on this whole idea that you really, really, really need to have an objective person who's not part of the conversation to take notes and document the discussion. And a lot of that also has to do with... You could not take enough notes and you would spend more time taking notes and actually getting the information that you need. You can go back to the notes later, but it's really important that the person taking those notes is not involved in the conversation. Additional Lessons Learned, again, let the people who were still homeless or were formally homeless tell their stories and then you identify the qualitative data that's helpful to understand at a coordinated entry system, through their storytelling. You also need to be completely non-judgemental. In one of the focus groups with still homeless and formerly homeless persons, I actually had a lady come in and she fell asleep, and stayed asleep through the entire thing, and some of her participants were a little put off by that, and I said, "You know, it's alright. I don't know what her story is, but as long as she's safe, and, you know, we're good, so be non-judgemental because you really think about this from a client-centric perspective and how are they feeling about things.

0:41:51 Freeman: Know the coordinated entry system design and the participating agencies before you conduct your focus group. I really thank my stars that I took the time to really understand that information before I went because it enabled me to actually talk about... Or at least get information about the coordinated entry process because I was able to say, "Okay there's this organization, okay, I know what the role of that organization is supposed to be. So this is what they're saying is how it actually happens." And then again, make sure that the community maintains responsibility for recruiting and balancing the participants. Don't use the local person to conduct the still homeless focus group, as I already talked about that's to minimize expectations for participation. Again, make sure you have a really good note-taker. Don't try to facilitate and take notes. And even when we were doing the note-taking, the person taking the notes might have been local, but it was not someone who interacted with the service providers or the clients to any point in time. There were no expectations of that person to participate.

0:43:13 Freeman: And then always try to use good research and evaluation techniques such as random selection, and participant balancing, and that's mostly to minimize the chances of weighted learning and any deductions that you might be able to get out of that. So this is my last slide. I'm gonna leave you with a couple of resources. I found these both really, really helpful in designing my focus group in figuring out how I was going to not actually facilitate it... What was I gonna say? How I was gonna present things? These are great resources for you, so once you get these you can actually download these and once you can slide that you can get to these lines. In there, there's a couple of questions that I think I can answer fairly quickly related to my section. If you don't mind we go ahead in doing that.

0:44:10 AM: Sure! Proceed.

0:44:12 Freeman: Okay, okay. Do I suggest communities identify facilitators that are not local? Yes, I do. Again, it's because if people were familiar with who you are and what you do within the community, then you can raise expectations higher than what they could be. If you have someone who's an intake worker who is facilitating the focus group then, again, if they thought I was gonna help them get housing, quicker, they're surely gonna think they're gonna get housing quicker if they're talking to an intake worker. We did not record the sessions. We were extremely sensitive to, in particular, the still home, or in form of homeless, privacy, and although I used some of the information that came from them, as part of the evaluation report, everything was de-identified. And again, in the analysis plan, we simply, it put other things into context. Some of the other things that people were finding were wrong or what could be improved, it was really, really helpful to use the client's experience as a way to put context around this. I am not going to tell you where I did the focus group, and actually as far as what time of day it actually happened over a series of two to three days, but if you're interested knowing more information about my experience you certainly can contact me after this session is over.

0:46:00 Freeman: And I will also say very quickly, there are some really awesome questions about conducting focus groups in light of Covid-19. Again, I wanna make Andrea and has time to finish her section. So again, let's just feel free to reach out to me afterwards and we can have a discussion around that. So thank you guys, I hope this was helpful.

0:46:25 AM: Great, Kat, thank you so very much. We are now going to move on to thinking about and looking at how to analyze qualitative data, for me where the fun begins and we have time for that. It's a straight forward process. And again, lastly we'll close out by looking at some of the resources that you can access even after this session. So qualitative data analysis is content analysis and it's very straightforward as mentioned. You want to be methodical, you want to be systematic, maybe you even work with a partner, but it's really accessible. I want everyone today to know that you can walk away from this and know that you yourself can do qualitative data analysis and have that be part of your coordinated entry evaluation process. Qualitative data analysis is linked to grounded theory, which I love because that's bottom-up approach to listening. So we're talking about text on a page, right? Maybe I skipped over a step there, we've done a focus group, we've conducted a survey, it has some open-ended questions, we've maybe conducted semi structured interviews and what results is we have a whole bunch of text, right? We have a whole bunch of text that represents the dialogue that was based upon our discussions.

0:47:54 AM: With that text in hand, we want to start mining it for insights, and it's really nice to keep in mind the framework of grounded theory, because it just lets us now and reminds us that we want to go into the process of assessing all of that text without expectations, we want to let themes and topics emerge, rather than us having some sort of framework going into the practice of assessing the text and coding for it. So again, it's bottom up, it results in a qualitative interpretation of the text data and sometimes it's even communicated in the grounded theory framework, you might even communicate your findings visually, rather than through a report or visuals. In our case, in coordinated entry eval, that's probably likely not what we're going to be doing, but it is a nice approach and framework, and I'd encourage you to look into it a little bit further, if you're interested. Here are the steps that we want to take once we have that text in hand. First, we're going to conduct a cross reading [0:49:08] **____** codes with regards to the text. By that I mean tags or even labels.

0:49:17 AM: We're then going to take those codes after we've completed this process and maybe we've even run through that process a few times, we're going to code those codes into categories and then those categories into higher level themes, so that ultimately we have distilled our text data down into chunks of information that are schematically linked and that we can then work with as even a type of quantified data. So looking at that a little bit more closely, again, for cross reading, I just mean read and re-read and re-read the text, so that you have a very clear understanding and so that you're even able to pick up on, not just the manifest content, but the latent content, right? Like basically, what's emerging between the lines and then as you're doing that, you want to start labeling the things that are emerging for you with regards to themes and experiences and feelings and so on. As I've mentioned, you can run through the text multiple times and continue to re-read and label as you go along. And lastly, a nice approach initially, is using some sort of highlighting, underlining, that sort of thing.

0:50:40 AM: Here's an example for you. In this example, the person is, this might even just be a Word document and they're color-coding, they're highlighting text passages, and then they're labeling it in the margins. And then from there, they would look at their labels, and they would organize their labels into themes and be able to then start assessing and analyzing the data. An example of tagging or labeling your data might include noting that the respondent is so angry at stuff. Just put that into the margins, again, maybe use color coding, it's a nice approach move text around. Some times in this phase, this very first preliminary phase, I've actually at times, even done this in Excel, I've copied and pasted all of the data into Excel and then I literally moved the text around, according to themes or positive or negative balance or that sort of thing, by specifically moving it around the next column [0:51:49] ____ and having it live in different columns and that sort of thing. Again, we're distilling, we're organizing and organizing, so we're working our way up to higher level themes, often where where you want a set of four to five, maybe up to eight different themes, based upon your labels, and then based upon your categories.

0:52:21 AM: And once that has occurred, you can of course start interpreting that data and even use quantitative techniques and visual techniques, you can for example, actually run frequency analyses. So you could be reporting that well of all of the conversations you have and all of the dialogue that resulted, if there were six themes that are merged and you could present those visually. And then within one of the themes, there were five key topics that seemed very important to people. So it's just using our traditional approaches to data, but in this case, then doing so with data that has started off as narrative and even stories. You can certify by positive and negative sentiment, that's a nice technique when summarizing this sort of information for others and highlight keywords and key phrases, that's another nice approach to just creating a quick summary, let's say, of all of the dialogue that has a resulted from your qualitative data collection activities. So QDA, utilizing AI because I can always appreciate a good acronym. Instead of doing a live demo for you, I'm just going to show you some screen shots so these days, there's a lot of nice tools out there that are accessible that actually use AI... Artificial intelligent techniques to do text analytics.

0:54:02 AM: They mostly focus on things like sentiment analysis, motion detection and keyword extraction. There's this really fun and handy tool out there that you could access for no cost and use. It's an add-on in Excel, it also has an API, but part of what I'm showing you here is the low cost, low overhead version of doing qualitative data analysis. So you plug your ParallelDots by the way, it's called ParallelDots a simple web search will get you to it. You plug it into Excel, and then magical things happen. In Excel you just copy and paste your text right into Excel. For this example, I just copied in pieces, some text that was up on my screen in one of my browsers then you activate it by simply using a formula just like you would use any other formula in Excel, it's equal ParallelDots underscore and then the type of analysis you want to conduct.

0:55:11 AM: You then drag the formula down your rows. Again, just like you would with any type of formula, or function in Excel. And while doing that after a few moments, the tool ParallelDots will generate for you your output basically, right? So, here I actually ran three different analysis. I did a sentiment analysis, intention, and emotion and after a few moments, it does chug for a minute or two and then it gives you your output. So this is also a wonderful way to start off a qualitative data analysis approach or maybe to just get a high-level view of what is in all of that text that you have in your hands. It's also another way that you could use traditional quantitative approaches to both presenting and visualizing the data that has emerged from your quantitative or qualitative passages.

0:56:20 AM: I also want to mention one other thing word cloud has fallen out of favor, but there are still nice tools available online where you just again, just copy and paste your text right in and within a moment, it'll return a Word Cloud for you. And the thing about Word clouds here for our purposes is how handy they are for immediately identifying key words and even key topics. So again, it's something that you maybe do at the very beginning of your process to get that click look at. Okay, what is it that these folks have told me, and what are the main things on their minds? So this is just a screenshot from the click guide that I mentioned I put together for you and we have a few minutes left so I'm going to then show you the resources that I have also included and will upload as part of the slide deck. The first set of resources is about the Lean data model and Listen For Good approach. The second set of researches are lists even of platforms and organizations and so on, who provide tech options for data collection, things like text messaging services, folks who install kiosks to collect data, things like that.

0:57:51 AM: The Lean data and Listen For Good model, I think is highly applicable to the work that we do. The Listen For Good model is based here in the States and so far they put forth over 200 non-profits who work directly with clients and have found that by using just five questions, perhaps supplemented with a couple of demographics and or some follow-up questions they can collect a lot of data in a ongoing way that they're finding it's rigorous and valid and reliable.

0:58:26 AM: We're not going to have time today to get too much into it but again, it's gaining traction over these last couple of years and it's an approach I think we could really make good use of. The thing I love best is that idea that there's just five core questions that can return to you a wealth of information about your services and programs and projects. The Listen For Good model actually includes in their field guide a template for you of questions depending upon who you're talking to and what your services are. I thought that that was really wonderful and handy so I've provided a link there and the thing too that's really neat about these two models is they have a high emphasis on closing the loop so we collect feedback in an ongoing way, we act on it because it's actionable, and then we tell the folks who we collected it from what we we've done. We report back to them and that then allows them to know how their influence's being used but also feel valued at one point over the last few weeks.

0:59:36 AM: And so tracking down some of these resources I heard it described as them being able to be the protagonist in a story of change, and I really loved that idea. So we just have a minute or so. Again what I've done here is I've provided you with the field guides where you can look into organizations that provide various tech options. Here's a really nice guide. Even including price points with regards to various tech options on how to integrate them into your avail process. It's in your click guide and here are the two videos I mentioned of folks who are using both a Lean Data approach and even in the case of these folks in Arkansas, they our specifically working with the Listen For Good movement let's call it.

1:00:32 AM: So, I got for you to take a look at those if you're interested in hearing from how folks are implementing this type of model to collect a lot of feedback in this story, maybe I'll close with this... With regards to the kiosks, I was told that in two years at the kiosks that collected feedback from folks have been installed, they've received feedback from over 2500 people and their report is that of course they would never get anywhere near that if they were trying to administer surveys and that sort of thing. So a really exciting and innovative stuff out there. I'm sure that they would love for you to reach out to them if you wanted to learn more. And that brings us to the end. Here is Kat and I are available here.