



Coordinated Entry “Secret Shopper” Project *Lived Experience Consultants of Southern Nevada* October 2023

OVERVIEW

The “Secret Shopper”¹ project was a roughly three-month initiative with the goal of providing an unfiltered and honest assessment of the Southern Nevada Coordinated Entry (CE) process and effectiveness. The Southern Nevada Continuum of Care Board of Directors is reviewing insights and key recommendations from this project, with the goal of improving the effectiveness and service levels of the CE process.

METHODOLOGY

Membership in the Secret Shopper Team was voluntary, and individual site visits were based on availability and schedules. The project team identified a total of 11 different CE sites utilizing the list of approved CE site participants, as documented on the flier obtained from the HelpHopeHome.org website of Southern Nevada. Some of the sites were separated into multiple visits by different volunteers, such as in cases wherein families or youth or single adults were serviced separately. Volunteers were chosen based on demographic suitability; for instance, youth services were allocated to the younger generation and family services targeted the older generation. When the team met with scheduling conflicts and resource limitations, Secret Shoppers outside the team participated in some of the CE site visits. These participants were typically family or close friends who were nominally financially compensated for their time and invaluable help. Fictitious identities and personal storylines were used, including aliases and dates of birth, which were later removed from the Homeless Management Information System database to maintain the purity of the system.

The team created a Coordinated Entry Site Evaluation Tool using Google Forms. This tool included the 30 unique fields listed below. Fields that are self-explanatory have no additional commentary. For applicable fields, which are identified with an asterisk (*) below, the shoppers provided a ranking from 1 to 5, with 1 being the worst or lowest score possible and 5 being the highest or best score possible. Each ranking score also provided a comment field for further elaboration.

1. Timestamp—The date and time the CE site visit evaluation form was submitted
2. “Shopper” Name—First and last name of the alias that the shopper used
3. Date of “Shopping”—Time and date of the actual CE site visit
4. Access Point Site Name—Official name of the CE site that the shopper visited
5. Time Began at Site
6. Time Completed
7. Brief description of scenario (what you as the client told site staff about your situation)—Alias and personal storyline

¹ As the “Secret Shopper” terminology was the name of the project, it should not be taken literally. LivedX participants are also referred to as “shoppers” in connection with the project name.

8. *Site was open and available during advertised hours—Availability or days/hours of operation was determined based on the official HelpHopeHome.org CE flier document
9. Comments on rating (Availability)
10. *Amount of effort required to get to the site (e.g., finding the correct place based on advertised address; parking if driving a car; bus stop proximity if taking a bus)
11. Comments on rating (Location Convenience)
12. *Greeting / “customer service” from site staff upon arriving
13. Comments on rating (“Shopper” Greeting)
14. *Quality of process explanation received or explanation of what to expect
15. Comments on rating (Process Explanation)
16. *Body language, tone, and treatment by site staff during interactions
17. Comments on rating (“Shopper” Treatment)
18. *How the person accessing support was made to feel (e.g., burden vs. welcome)
19. Comments on rating (Emotional Experience)
20. *Active listening skills and engagement of site staff
21. Comments on rating (Active Listening/Engagement)
22. *Clarity of information shared by site staff
23. Comments on rating (Quality of Information)
24. *Follow-through or follow-up with services (e.g., length of time it took to receive information after interaction, quality of information received)
25. Comments on rating (Follow Through)
26. *Quality of materials provided by the site
27. Comments on rating (Quality of the Material)
28. *Overall experience with the access point site
29. Comments on rating (Overall Experience)
30. Additional Notes or Comments on Experience—Open field, add any additional comments here

All Secret Shopper CE site visits were documented using Google Forms and verbally shared with the team on a weekly basis to track the progress and results of the ongoing project.

Additionally, looking back at the scope of the project, it would have been useful to also include additional fields in the CE site evaluation form, such as:

- Racial or ethnic makeup of the CE site staff.
- Other diversity, equity, inclusion (DEI) CE site assessments.

ASSESSMENT AND REVIEW

The final tabulation of scores and assessments identified numerous areas for potential improvement.

Upon the completion of all CE site visits, and after team review and inputs of the collective data, the team organized separate individual meetings with each of the CE site participants attended by

key representatives of each CE site, representatives of the U.S. Department of Housing and Urban Development (HUD) technical assistance members, the Secret Shopper lived experience consultant, and another colleague with lived experience for team support. The goal of the meetings was to provide non-judgemental and honest feedback on what was good and what needed improvement.

Overall, the results outlined significant areas of improvement across the board, which the team shared with the CE sites during the meeting, both in written summary and verbally. Specifically, the meetings highlighted a total average secret shopper score of all CE sites, along with specific results and data related to their own organization. The team kept any information shared from different organizations strictly anonymous.

Despite the data often coming across as brutally honest, these meetings were well received with tremendous participation within the organizations, and many actively asked for other suggestions that might improve overall services and support provided to vulnerable populations. One common theme during these meetings was a deep desire for some sort of continuous feedback and process improvement through the use of more regular Secret Shopper activities.

FINAL REPORT AND RECOMMENDATIONS

The team compiled consolidated recommendations following the Secret Shopper initiative with the HUD technical assistance team and lived experience consultants of Southern Nevada, then presented the final recommendations for improvement to the Southern Nevada Continuum of Care Board of Directors.

Overall, the “Secret Shopper” project highlighted several key areas for improvement, with the greatest being a lack of actual help and active housing problem-solving. Disappointingly, out of the 11 site visits, not a single one provided actual, tangible help. The reasons varied, but common themes included organizations being far too focused on the process instead of the people and, ultimately, failing to identify success metrics that focused on end results. This strict focus on process often resulted in Secret Shopper participants being unable to obtain any real help, large or small, due to the myriad of obstacles and challenges presented by the support organization in their efforts to diligently adhere to the process and internal requirements. And often when help was offered or possible, a lack of inter-organization coordination and ownership resulted in failed outcomes, with the urgently needy being unable to find suitable temporary housing for themselves or their families.

Nonetheless, awareness is the beginning of self-improvement. The eagerness of the support organizations to absorb the non-judgemental feedback and trigger reflection and internal assessment for improved service levels and greater successful outcomes was a very positive step toward improvement.

Advances in technology have made it possible to apply for many resources online. The closures of offices during the pandemic accelerated the rate at which new processes were introduced and adopted by many agencies providing housing assistance and other resources. During this time, the training of staff on how best to navigate resulting challenges was sometimes lagging, lacking, or not thoroughly addressed. Organizations now have the opportunity to review and improve their online applications.

Moving application processes online can bring substantial benefits to organizations in terms of efficiency, capacity, throughput, and staffing requirements, but the advantage of handling

programs entirely online may increase the possibility of unfavorable outcomes for many prospective recipients of the services. The people we are trying to serve are more likely to have difficulty navigating online application processes or lack access to technology, which could prevent them from being able to complete the application.

For example, among older adults, access to and understanding of technology decreases as the age group increases: 71 percent of adults aged 65 to 74 say they are smartphone users, but that share falls to 43 percent among those 75 and older. Additionally, those living in households earning less than \$30,000 are less likely than those in higher-income households to own a computer with access to the internet. Now the Affordable Connectivity Program assists recipients of Supplemental Nutrition Assistance Program, Medicaid, or Supplemental Security Income benefits to obtain improved access through consumer subsidies. Still, organizations that have implemented online application processes should keep in mind that the process may be unfamiliar, challenging, and difficult for applicants.

Some of the difficulties experienced by users of online applications are specific to the way the process works in their community. In one jurisdiction, recipients of Emergency Housing Vouchers were not notified that the rental specialist they were assigned to was subsequently separated from the local housing authority. Email correspondence to that email address was not being monitored. Only after prospective landlords submitted requests for tenancy approval packages to the email address of the former employee and received no response was the issue identified and resolved. Conversely, housing authorities may be sending important correspondence electronically to clients whose email address has changed. When sending applicants email correspondence, especially when it includes a determination of eligibility for requested benefits, make sure to include a request for acknowledgment of receipt. Rather than assuming that an email sent has been read and understood, set a time period after which to send an additional email containing in the subject line something like **“Have you received your eligibility information?”** with the request read receipt feature enabled. Additionally, email addresses that are no longer current should be deactivated promptly so that senders are immediately aware of the need to deliver to an alternate address.

Many online applications require submission of documents, forms of identification, and verification(s) of income. A method of encryption protecting this information must be provided so that clients can upload necessary documents without risk to their personally identifying information.

One client who had completed their application in its entirety found they were prevented from successfully submitting it because their uploads exceeded the maximum file size permitted. After multiple attempts, the program disabled the attachment option and did not suggest an alternative method of supplying the requested information.

Where possible, providers ***should***:

- Use **plain language and clear instruction** to be inclusive for people of all educational levels.
- Provide **in-person or telephone navigators**.
- Make **real-time chat-based assistance** available and easy to use.
- Provide **dropdown selections** in applications.
- Ensure **page displays are responsive** so that information is readable on any device type.
- Only require and collect information **essential to providing services**.

- Develop methods of **measuring outcomes**.
- Provide **language preference choices** and access to a language line that translates the application.

Providers ***should not***:

- Present **barriers to accessing or completing the application**, especially for people with limited or no access to technology, limited technological skill, or limited English proficiency.
- Assume electronic correspondence has been **received, read, and understood**.
- **Assign blame** to an applicant for technical, or technological difficulties.
- Allow absence of non-essential information to **prevent submission of applications**.
- **Ignore or dismiss feedback** from clients on their experience with the virtual process.
- **Neglect to communicate regular updates** to the client while alternative solutions are identified or ongoing issues remain.

Applicants ***should***:

- Review applications prior to completing them online to gather and have ready all of the **required information and supporting documents**.
- If possible and able, **check the equipment** they will be using to ensure it is working properly and has the capabilities necessary for the process.
- Make sure to **print out (or save) their completed application** and capture any identifying confirmation number, case number, or transaction number.
- **Request a read receipt** and document the date and time their application was submitted.

Applicants should not:

- Allow the challenges of completing online applications to **discourage or deter them from accessing resources** for which they are eligible.
- **Refresh the page**—doing so may delete information entered up to that point.
- **Exit partially completed applications** unless there is a “save and continue” option.

Remember that the process of applying online for housing assistance and other services is a challenge for many clients and may be a source of frustration and anxiety.

Make the process as simple as possible and include input from application users in the design or redesign of their online application processes.