

Client Outcomes Measurement Tool*

Provider Guide

***User title: Client Check-in Form**

Purpose of the tool

The purpose of the Client Outcomes Measurement Tool is:

- to be a simple tool that is used by BFC providers with their clients, so clients can provide feedback about their progress and outcomes, and their satisfaction with services
- to enable standardised and consistent tracking of client results at a provider level, so that we can measure apples *and* pears, and so providers and MSD can continuously improve BFC services to clients
- to be aligned to the result measures in providers' contracts, and with databases in common use by BFC providers (especially Client Voices).

How to use the tool

To support the purpose, this tool should be the 'default' for all BFC providers.

Recommended practice for the first form: 'About your Situation'

This form gives pre and post information about progress against the BFC result measures.

MSD recognises that many aspects of a client's situation are beyond the provider's control, and thus the 'story behind the data' in your reports to MSD is important (e.g. if the lack of a living wage or rents in your locality are limiting a client's ability to meet their basic needs and obligations).

MSD recommends that the 'about your situation' page is used *face to face at the beginning of every session*. This will mean it can be used as a tool to help support conversations between the worker and client that draw out meaning about the stories behind their ratings, and how the client is feeling about their situation. These conversations may be useful as a lead in to conversations about goals through the Financial Plan of Action, noting that scores may go up and down, and it is important not to make assumptions about these without reference to the client. Using it every session will also mean that the client's progress over time can be tracked (or even charted), enabling the client to see the progress they are making, and to celebrate success.

It also means that you can report on outcomes, even if a client becomes a 'no-show'.

Recommended practice for the second form: 'About our Service'

This second form provides information about the quality of the service provided to the client.

MSD recommends that this page is used *face to face at the end of every session* to allow for direct and timely feedback that privileges the 'client as expert' in their feedback about how well the service is working for them, and how the service can better meet their needs. To enable this requires the building of trust and an approach of the client being the expert about the service that will best meet their needs.

Minimum standard required for both forms

At a minimum, to enable reporting on pre and post intervention change:

- use the 'about our situation' form at the beginning and end of a client case
- use the 'about our service' form at the end of a client case.

Question Prompts and Scripts Resource

Introducing the 'About your Situation' page (at the beginning of the session)

- To help me understand how things are going for you, we use this 'Client check-in form'. It helps us to improve our services to you and others, and will help inform our reporting to MSD about the funding we have received for this service. MSD may use our overall results with all our clients for monitoring and evaluation purposes. None of the information we provide to MSD will identify you individually.
- It only takes a couple of minutes to complete and it'll be the first thing we do every time we work together.
- I just need to you write your name and the date on this form and then circle the number you think best reflects you in each of the four questions. Feel free to write any other comments on the bottom of the form.
- There are no right or wrong answers – it's just what you feel is right for you.

Questions to support reflection on first session answers

- Looking at your scores – do they make sense of how you feel about your money?
- Which of your scores bothers you most? Can you tell me about that?
- I see that you scored yourself lowest on ___. What made you score yourself there?
- Is there anything you think you could do to help improve your scores before we next met?
 - Think about it during our time together, and perhaps we could add it to your Financial Plan of Action.
- Pick one of your scores and think about one thing that you could do this week to make it just a little bit higher – not all the way to 10, but a first step.
 - Would you like to record this on your Financial Plan of Action?

Questions to support reflection on follow-on session scores

- How are your scores looking this week?
- Have they gone up or down? Why? Does that make sense of how your week was in terms of your money situation?
- What do you think caused your scores to change? (overall or specific)
- Are you satisfied with the change that occurred?
- What is your next step? How are you going to make sure that you achieve positive changes in your scores?
- What score would you like to reach in our work together?

Introducing the 'About our Service' (at end of session)

- I want to ensure that we support you as best we can. I value your feedback on that.
- We want to ask your feedback every week about how the session was for you.
- We use your scores from these questions to help us know how we are going.
- Based on your scores I might ask you how we can improve on what we are doing. Your feedback helps me to work better with you and others.

FAQs about the Client Outcomes Measurement Tool

We already have our own Client Feedback form that we would prefer to use – do we have to use this one?

To meet the core purpose of enabling consistent and standardised measurement across BFC services, this tool be the 'default' feedback form for all BFC providers.

We have other measures that our Board / other Funders require us to report on.

The document has been kept in 'word' format, so you can add measures in the event that you have other measures that you need to report on.

Can we report these results into *Client Voices*?

Yes. The tool has been built into Client Voices as part of each client case.

We are worried about whether our clients will give honest feedback about our service if they complete the form face to face with the worker

We expect that the worker may need to explain several times over several sessions that honest feedback is sought as the worker is truly wanting to know how to make sure that the service is best tailored to the client's needs, and that their feedback will form part of a conversation about how to improve the service to the client. The first couple of sessions may show very positive feedback (before trust is built) but hopefully by the third session, the client will have enough trust in the worker to be more honest. This may mean that ratings drop at about that point, before starting to improve again.

The client's scores are only meaningful to the extent that the worker understands what specifically the client means by their score and they have the opportunity to speak to that and see it acted on. When done each session, directly with the worker present, this is not primarily a data collecting exercise – this is a 'creating feedback culture' exercise.

Frequently workers initially react to this because it places them in a vulnerable position, until they experience the profound benefit it can have for their practice. It will support workers to become more reflective and client centred in their practice, and is a tool for the provider to have good feedback on how to improve services overall. This is illustrated in the following quote from *Poverty Interrupted: Applying Behavioural Science in the Context of Chronic Scarcity* by Ideas42 (2015, p48).

"Organisations that treat families as experts with valuable information stand to benefit structurally. Families may provide unexpected insights into the causes of recurring programmatic struggles: if frequent no-shows are a problem for instance, a participating parent may be best positioned to identify a mismatch between appointment hours and common work schedules, or to determine how far in advance a meeting should be scheduled. Feedback that is surprising should be taken particularly seriously, as it may highlight a discrepancy between the way that a programme was designed or intended to work, and how it is being carried forward in practice."

We think we get more honest information if client feedback is anonymous.

The tool is not anonymous. This is because in your reporting to MSD, you will need to report on clients who have been referred, started the service, closed from the service, their level of satisfaction, and their results achieved. You should therefore advise the client that overall information from all clients (numbers not comments) will help you in your reporting to MSD.

Please note that your reporting to MSD about client results will not include information that would identify individual clients, but rather aggregated results reported (in numbers) for all the clients who have received your service. Therefore the information about client

results would not and could not be used to identify individuals. The information would be used by MSD for monitoring and evaluation purposes only.

If a client does not wish to complete this form, please report 'N/A' for client results. You may also wish to make a note of the reason why in their case record.

Our clients have low literacy, and might not understand the form.

The tool aims to use as simple a language as possible, but providers should assist / explain the process of completing the form as required.

Some people prefer emoticons to the words *No / Sometimes / Yes* and this may work better for low levels of literacy. Feel free to cut and paste these emoticons into the tool in place of the words if you prefer:



Isn't a 1 – 5 scale sufficient?

We recognise that achieving change with clients can be difficult and thus a larger scale 0-10 allows for better tracking of gradual change over time than a 1-5 scale would. The 0-10 scale also aligns better to the Financial Plan of Action.

How do the 'about my situation' questions align to the result measures in my contract?

I / we have enough to meet our basic needs and obligations

- Aligns to measure: # who report being better able to meet their families / whānau basic needs and obligations (comparing pre and post intervention).

I / we feel in control of any debt

- Aligns to measure: Of those who presented with debt, the # who reduced their total debt (pre and post intervention, provider reported).
- Another option considered was 'Reducing our debt' but 'feel in control of any debt' gives a better indication about how the client feels about reducing any debt.

I / we can confidently manage our finances

- Aligns to measure: # who report having greater financial confidence and capability (comparing pre and post intervention). Aims for a simple way to say this.

I / we are on track to achieve our goals

- Aligns to measure: 'Completed the service with most or all of their goals achieved, or evidence (in workers opinion) of ability to achieve their goals without further support'.

How do the 'about our service' questions align to the client satisfaction measure in my contract?

The three questions cover the key aspects of service provision:

- building a strong relationship
- meeting the client's needs
- building the client's capability.

All three questions, in aggregate, enable providers to answer the BFC quality measure: "Of the clients who provided client satisfaction feedback, # who were satisfied or very satisfied with the service".

When you are reporting on your contract on this, you should report the average of the three measures from your *last* session with the client. If the average is '7' or above, you would have achieved this measure.

How do we report on these results to MSD?

The tool is designed to enable you to report pre and post intervention positive or negative change to MSD that ascertain whether results have been achieved.

MSD is ultimately less interested in whether your client achieves say an 8 or a 10, and more interested in the extent of movement between pre and post intervention for the client. A client whose situation starts at a '2' and ends at a '6' may be a more significant achievement and have a higher level of need than a client who starts at a '7' and finishes at a '9'.

How do we report on results for one-off clients?

Because the tool is recording self-reported pre and post intervention change for the client about their situation, we expect that there will be no result achieved for clients who are one off. Therefore you should report N/A or advise that they were 'one off'.

You will however be able to report on client satisfaction with the service if the average score for the 'about our service' was '7' or above.