

Annual Evaluation Report 2020

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Building Capacity for Internal Evaluations of Client Satisfaction





Executive Summary

The 2019-2020 evaluation of PB&J Family Services focused on developing an organization-wide client satisfaction survey used to evaluate program performance and whether PB&J staff are meeting their service goals, particularly by building relationships with clients. PB&J Family Services serves at-risk children and their families and supports positive growth and development for their clients through the many programs and services they provide. Examples of services include the Therapeutic Parenting Program, daycare and pre-school services, and home visiting.

Understanding how clients perceive their interactions and experiences with PB&J staff members and how staff members wish to interact with families allows for evaluation of different qualitative measures of satisfaction. PB&J is interested in developing a survey that will tell them to what extent they are meeting their service goals, are leaving clients satisfied with their services and experiences, and if the staff's core values and practices are being demonstrated in their interactions with clients.

Overall, PB&J staff identified 9 values, principles, and practices that inform their work with client families. Clients also identified important values and behaviors from PB&J staff that make them feel welcome and that contribute to a positive experience. Using these values and practices along with information from clients, the evaluation team identified an overlap in what staff and clients value. The staff believe that having integrity, open communication, and being supportive and non-judgmental is integral to serving client families. Clients believe that access to resources, emotional support, having trustworthy and honest interactions with staff, and being encouraged to be their best self are all aspects of what makes PB&J a welcoming place and what brings them back through PB&J's doors.

When asked about their PB&J staff member, clients said:

"They help me find my positive self"

"She helped me become a better mom and be more patient with my son."

Using information from staff and clients about these values and expectations, the evaluation team developed a client satisfaction survey intended to capture these hard-to-measure outcomes that are integral to the work being done at PB&J Family Services, specifically how clients and staff build relationships together.



Introduction

PB&J Family Services have been helping at-risk children grow and develop into their full potential in nurturing, supportive families since 1972. As a non-profit organization, they serve families and children at three locations in Bernalillo and Sandoval counties with the hope of meeting clients where they are, both in terms of geographic location and in terms of meeting families' immediate service needs.

For PB&J's 2019-2020 evaluation, the team decided to develop a client feedback survey that can be used throughout the organization to help evaluate how clients feel about their experiences at PB&J, including the services they receive as well as the interactions they have with various staff members. Clients will be able to complete the survey regardless of what program they participated in, giving PB&J valuable information about client interactions across programs and identifying areas where they might need improvement.

The evaluation project is focused on measuring clients' satisfaction with their interactions with staff and the various PB&J programs. Questions on the survey were developed using information from staff meetings and client focus groups that identified what matters the most to those who are involved with PB&J Family Services. The appropriate stakeholders that are engaged and involved in the process include PB&J staff from all departments and programs as well as current clients of PB&J Family Services.

Working with PB&J Family Services this year, the 2019-2020 UNM Evaluation Lab team members are team lead Melissa Binder, PhD (Associate Professor of Economics), and lab fellows Jessica Hitzman (Master of Public Policy student) and Emily Guerra (Master of Public Health student). PB&J Family Services team members are Jennifer Thompson, Associate Director of Clinical Services, and Felicia Tapia-Alvidrez, Associate Director of Family Services.



Work Performed

When discussing the purpose of the evaluation, the team became aware of PB&J's interest in self-evaluating their interactions with their clients. Having a client satisfaction survey that can be used across all PB&J programs allows the staff and management to self-evaluate their success in building relationships with families and to see where they can improve. In addition to evaluating staff-client relationship building, evaluating the extent to which PB&J meets their service goals through the client satisfaction survey will give them valuable information about how clients experience PB&J programs.

To develop the survey, the team worked to identify what values and practices were most relevant to the PB&J staff members in how they do their work. The team completed a **brainstorming session** with staff members from various programs at PB&J to come up with a list of values, principles, and practices that define the work that they do in the organization. For instance, staff identified *non-judgement* as a value that staff should uphold when serving client families. The full list of values, principles and practices can be found in Appendix A.

The team then used the ideas identified by staff to **develop rubrics** of performance. This consisted of several meetings in where participating staff defined and expanded on the values, principles, and practices with concrete examples of performance. By defining these ideas further in the rubrics, the staff came up with several measures of "Exemplary" performance that they would like to see from their staff, such as being a "team player" or exhibiting "interagency communication." These ideas and the subsequent rubrics the staff created were then used to develop questions on the client survey. Including these ideas on the survey will help determine if PB&J staff are upholding these values in their interactions with client families during their work. Questions in the client survey reflect the staff's ideas of what achieving or exemplary performance looks like in their interactions with clients. All nine of the final rubrics completed by the team are available in Appendix B.

In addition to learning about the values that staff hold, we developed protocols **for two focus groups with clients** to help determine what ideas and values the clients hold and whether there were similarities in what staff and clients valued. The first focus group took place in November 2019 and the second in February 2020. The consent form and protocol for the interactive client focus group can be found in Appendix C. Understanding the client experience matters for the evaluation because the experiences illustrate what PB&J staff are currently doing that families appreciate and see as helpful or needed. The participants for the first focus group were parents from a recently-started parenting group. While they had only experienced PB&J services for a short period of time, the data collected during the focus group activities was useful to understand how newcomers perceive the organization. The participants for the second focus group were personally invited by staff members and came from a variety of programs and have been involved with PB&J for various lengths of time.

The focus groups consisted of three different activities followed by group sharing and discussion. Each activity was focused on understanding the positives and negatives that

clients have encountered in their time at PB&J and asked them to reflect upon staff interactions they have had. Asking clients to describe positive and negative interactions as well as their feelings after interacting with someone at PB&J informed our survey with real-life examples. Using the client's ideas from the focus groups, we can see how client expectations match with the staff's expectations.

After collecting the data from the focus groups, we reviewed and **themed the client's responses** with relevant stakeholders, including PB&J staff members, management, and the evaluation team. Coding with PB&J staff gave us a better understanding of what the clients are saying about their experiences at PB&J using language directly from their programs.

During **survey development**, we reviewed the list of staff values, principles, and practices as well as the themes and examples given from the two client focus groups. To develop the final survey, we compiled the ideas from the staff meetings and focus groups into a cohesive understanding of PB&J's goals to successfully provide client services and to build effective relationships. The final survey questions reflect the language and ideas that came up during these staff meetings and focus groups.

Lastly, our evaluation team **developed a set of implementation options** for PB&J to determine the best route for administering the survey at a later date. The implementation options include online administration through SurveyMonkey.com or anonymous paper administration bi-annually at PB&J locations in the South Valley, Southeast Heights, and Bernallilo.



Data Analysis

The first step towards creating a client satisfaction survey was to understand the values, principles, and practices that inform the ways PB&J staff interact with client families. As a group, staff from varying departments initially identified a total of 47 values, principles, and practices that matter most to their work at PB&J. This list was then narrowed down to 16 values, principles, and practices, and of those 16 the top nine were selected to be made into rubrics. Using phrases like non-judgement, transparency, and open communication, the staff defined what things are most important in the work that they do.

RELATIONSHIP BUILDING

Because relationships with clients and families is integral to PB&J's mission, the team decided to focus our rubric making efforts to define levels of achievement for relationship building. The levels of achievement were defined by PB&J staff using their own words for what it means to be successful at each level. The final levels of achievement were decided on by PB&J staff, with "Weak" being the lowest level, "Developing" as the second level, "Achieving" as the third level which was identified as the standard measure, and "Exemplary" as the highest level and what PB&J staff are aspiring to see. Relationship building as an outcome encompassed the following subtopics: *Integrity, Process of Engagement, Supportive, Consistency, Clarity in*

Goals, Open Communication, Safety, and Non-Judgment. These subtopics were chosen via group consensus on the most important values in trying to build relationships with clients and families. An additional client rubric was created using information from the other eight rubrics that centered on things clients themselves do or say that contribute to relationship building, such as being aware of safety plans or being engaged during home visits. Subsequent meetings with PB&J staff and management allowed our team to make progress in the development and finalization of the staff performance rubrics. Under the Relationship Building category, the team was able to complete and report nine finalized rubrics for use in staff evaluation.

When defining what *Integrity* would look like in their performance rubric, staff identified exemplary measures of integrity as things like: “Takes clients to appointments, helps them schedule,” “Congruent with helpful values and beliefs,” and “Self-Motivated.” Measures of poor or weak performance included: “Not dependable whatsoever,” “Dishonesty,” and “Doesn’t value positive improvement.”

Exemplary measures of *Non-judgement* included: “Praise efforts and hard work,” “Discuss failure as part of progress,” and giving compliments to clients like “You look amazing!” Weak performance of this measure included “being condescending to others” and showing “open expressions of disgust”.

What does relationship building look like at PB&J?

- Integrity
- Clarity in Goals
- Safety
- Non-Judgement
- Consistency
- Process of Engagement
- Supportive
- Open Communication

In measures of being *Supportive*, staff identified the following as their standard: “Reliable, responsive to clients,” “Utilizing supports in the community through referrals,” and offering help to clients. Additional achieving measures, such as those for *Open Communication* and *Consistency*, included things that staff could do or say to improve relationships with the client and with other members of staff to provide the best services possible. *Process of engagement* referred to meeting clients where they are and meeting immediate service needs like providing transportation and food to clients. *Safety* included ways to keep clients safe on-site and at home through safety plan development and frequent safety check-ins.

These ideas, developed through the rubric process, gave the team and the participating staff clear ideas on what it looks like to meet standards of performance and gave staff an opportunity to voice what a good staff member looks like at PB&J Family Services. By allowing staff to actively define what these measures of relationship building looks like, we were able to get a more comprehensive idea of what PB&J staff might be looking to achieve in their interaction with clients and how they might be able to do so by adhering to the measures identified in the rubrics.

Clients also identified measures of relationship building as important to their PB&J experience. The focus groups helped us understand these measures of relationship building both from the perspective of the staff and from the clients. Being able to rely on staff, call their staff member when they are needed, and receiving advice that makes them feel like a better parent were all values and behaviors that the clients said they like to see at PB&J. Below are the overarching themes and ideas that came up during the focus group that define what

a good experience at PB&J looks like and how relationships form between staff and clients at PB&J:

FEELING VALUED, BEING GREETED, AND BEING COMPLIMENTED

When asked to describe things that a staff member could do or say to make a client feel welcome, the focus group participants recognized several behaviors and phrases that they have experienced and heard from staff. Among these included being welcomed and greeted, where clients said they like to be told “Good morning” and to be asked how their day is going when they come in for their services. Clients wished to feel respected and not judged at PB&J and they said that receiving compliments from their staff member, such as being told “you are strong and worthy” in times of doubt, made clients feel welcome. Feeling valued was also important to the clients in their interactions with staff, claiming that feeling “like a priority” and the staff “making kids feel important” at PB&J were central to their desire to return. Feeling as though they are valued and feel as though they “come first” in their experiences with the organization, the clients demonstrated a desire to be treated fairly and with respect and value.

RESPECT AND NON-JUDGMENT

Clients were asked to identify things that a staff member could do or say to make them feel welcome at PB&J. Right off the bat clients said that not being judged, not being discriminated against, and being respected were important to them when they come to PB&J. Similarly, when asked what staff could do to make them feel unwelcome, clients said that feeling judged by staff, feeling as though the staff had a bad attitude, and feeling like they were disrespected were things that would make them not want to return. For instance, “being negative,” “having no manners,” or “picking favorites” are all examples of staff behaviors that clients said would make them feel unwelcome at PB&J. Clients wish to feel respected and expect staff to be “non-judgmental” and accepting of all those that they serve.

SKILL BUILDING & RESOURCES

Considering the things that clients gain from their experiences at PB&J, many clients reflected on their newly developed skills and strategies. For instance, one client mentioned how she felt “better equipped” to deal with daily situations after working with PB&J staff, while others reported coming out of their PB&J program with “many ideas and strategies” they can use in their everyday lives. Some reported feeling “more organized,” and others reflected on the tips and advice they received from their visitor, like “how I can compromise” or “budget ideas and how to get ahead financially.” In addition to the skills they learn, clients also spoke of the resources and opportunities they received as a result of working with PB&J programs and staff, including involvement in various activities and connecting them to resources for health and emotional wellbeing, such as counseling services. One client told us how “for [her] daughter’s birthday they gave [her] supplies” for the party, and another client said: PB&J “help[ed] me to find a job and now I’m a part of their family.” Clients care not only about how they are treated by staff at PB&J, but also care about what they can learn from their staff members about how to be good parents and active members of their community.

STAFF SUPPORT

Being supported by staff through encouragement was another big theme that came up during the focus group. For instance, one participant told the story of how their staff member helped by “pushing positive to get back to college and get [their] degree” while another described how their staff member “accompanied [them] to legal appointments” and put in a good word for them with CYFD. For others, the PB&J staff “offered to help and intervene if necessary” in challenging situations and they “were always there to give a good note and was always positive about anything bad or wrong that was going on.” Staff are looked at through a positive light not only when they are able to provide resources and services to their clients, but also when they “have a positive attitude with the students,” or “welcome [clients] and make [them] feel comfortable.”

CONFIDENCE BUILDING

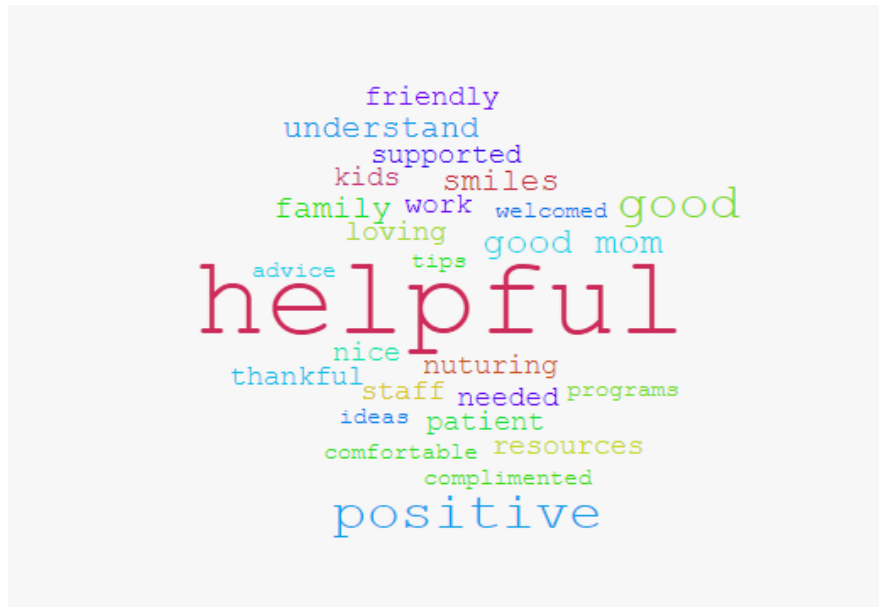
Clients were asked to write or illustrate a positive story of an interaction they have had at PB&J. Responses varied since the participants were in different programs, but most stories centered on things like building confidence and improving their self-image. For example, one client said: “My visitor invited me to do parenting classes which helped me understand that I am a good mom and that there are good and bad days, and that’s ok.” By working with her staff member and participating in PB&J programs, the client was able to develop a better sense of confidence in herself and her parenting abilities. One client spoke of how their staff member helped them “find [their] positive self” while others mentioned being told they were “a good example of a nurturing family” made them feel as though they were doing the right thing in caring for their child and encouraged them to continue nurturing behaviors. These stories highlight the importance of feeling good about themselves and their parenting abilities in building relationships. Similarly, there were examples of negative stories in which the client felt their parenting abilities were being challenged or questioned, such as when a staff member suggests a child “shouldn’t eat so much,” or asking “why [the client] wouldn’t be prepared to take care” of their child. Clients did not like feeling questioned or criticized.

COMMUNICATION, HONESTY & TRUST

Clients recalled instances of staff members working together to get the information that they needed as an example of a positive experience. One client said that even if their staff member does not know the answer “or doesn’t know how to help, right away she gets with everybody” to try and find the answer. Communication between client and staff as well as within the agency is essential to building honest and trusting relationships. Negative stories about staff-client interactions reflected themes of miscommunication and dishonesty. An example that a client identified is when their staff member “doesn’t visit every month...[is] always very late or doesn’t show up,” or when the staff member lies and doesn’t give the information they said they would. Another example is when a child had a bad interaction with another child, the parent “was never confronted” to address the situation which made her feel “isolated.” One client had a hard time trusting their staff member, and they spoke of how the staff member worked hard to build that trust by being “honest,” “real,” and by being “very motivated” to help her. Reliability and communication between staff and client

can lead to negative experiences when not handled appropriately, but it is essential to building trusting, healthy relationships.

Figure 1: Word Cloud Depicting Participant Responses – Positive Stories



SOURCE: Participant responses written during focus group when asked to describe a positive interaction they have had at PB&J Family Services.

Note: Created with Worditout.com. Size of words corresponds to frequency of their use.

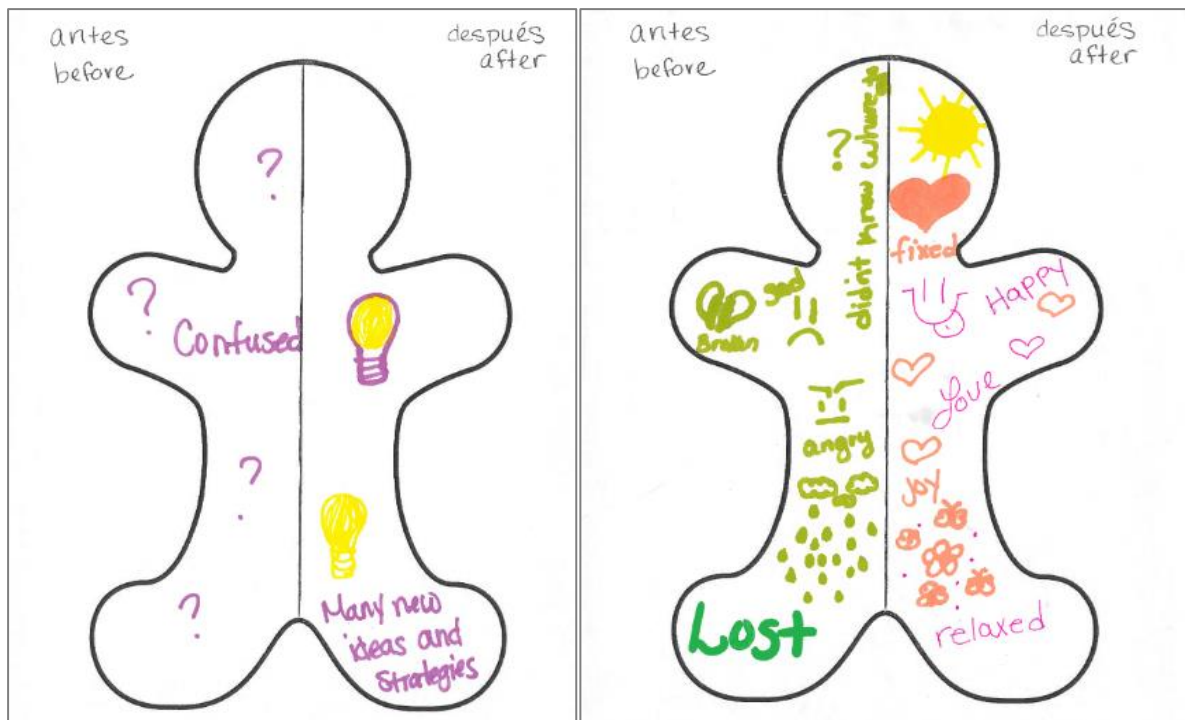
BEFORE PB&J: SADNESS, ANGER, LOST, CONFUSED

We also asked clients to illustrate how they felt before and after a positive PB&J interaction using gingerbread figures. Before coming to PB&J, clients reported feeling “lost” and “confused,” as well as “insecure” and “unhappy.” Many questioned their abilities as parents – “I did not believe I was a good mother.” Other reported feeling uncertainty, drawing question marks on their gingerbread figure and writing “HELP!” along the side. Also feeling a lack of support, some clients reported feeling “overwhelmed with everything that needed to be done!”

AFTER PB&J: LOVE, CONFIDENCE, MOTIVATION, STRENGTH

After their interactions with PB&J staff, clients reported feeling “happy,” “comfortable,” “love,” and “motivated.” One client said they felt “a lot more confident with the info I’ve been taught and given at PB&J,” suggesting they not only felt more sure of themselves but also received valuable information and skills that would help them in the future. Similarly, another client reported feeling “better equipped to deal with most emergencies or daily situations” and that they now felt they had learned “many new ideas and strategies” during their time at PB&J. In addition to having built confidence, clients also felt a sense of “motivation” and “strength” coming out of PB&J programs. After PB&J, clients said: “I am an awesome mother!”, “I know now if I put my mind to it anything is possible,” and that PB&J is “something I would recommend to every young parent.”

Figure 2: Gingerbread Man Participant Responses



SOURCE: Participant responses during focus group when asked to draw how they felt before and after a positive experience at PB&J.

STAFF AND CLIENT SIMILARITIES

Comparing what staff identified as important to their work with what clients say is important in making an experience positive at PB&J, we were able to see some overlapping ideas that are valued by both clients and staff. For instance, in the staff rubrics saying things like “You look amazing! I love how that brings out your eyes” to clients represents an exemplary measure of non-judgement. Similarly, clients reported that staff members calling their daughters “beautiful and happy,” being told “you’re strong, worthy” or being reaffirmed that they “can do anything” are things that make them feel welcome. Giving compliments is something that both clients and staff identified as valuable in their interactions.

In the staff *Communication* rubric, achieving was defined with things like “constant and regular communication with clients” and “keeps all scheduled visits.” In the *Consistency* rubric, they identified “never cancels” as an exemplary measure. During the focus groups, client’s examples of negative experiences were ones in which the caseworker “doesn’t visit every month” or “cancels group,” suggesting that clients also value communication and consistency in scheduling.

In the rubric for *Process of Engagement* (or meeting clients where they are), staff reported their standards of achieving as being able to “transport clients to appointments” and when the staff “listens, problem solves, and gets to know the client.” Similarly, clients’ positive

stories included instances where staff members “accompanied [client] to legal appointments” and reported gratitude for the transportation and food that is available to kids and families.

Overall, in this evaluation the team learned the values that make a good PB&J staff member and how clients see these values being upheld in their interactions at PB&J. After picking out the overarching themes among client responses, the team gained a better understanding of what success and satisfaction at PB&J looks like to clients and staff and what measures are most important to include in the client satisfaction survey.

The survey was developed by picking out the themes that appeared most often to draft questions and potential responses that included the actual words from the client focus groups. These include: communication, staff attitude, being greeted and welcomed, feeling supported, receiving information and resources, and feeling valued/accepted by staff. For example, we included a question in our survey that asks clients whether their staff member helped them get the information they needed, or how often the staff cancelled group - things that clients and staff directly identified as an important value. Using these measures, our survey captures client perceptions on whether staff are meeting service needs, whether clients and staff are building relationships, and whether the staff are upholding those things that are most valued to the client, like making them feel welcome or improving their parenting confidence. The full client satisfaction survey can be found in Appendix D.



Recommendations

The evaluation team has provided PB&J Family Services with potential administration options for the overall client satisfaction survey, including:

- Online administration using SurveyMonkey.com. By using this option, PB&J would be able to manage the survey creation, monitor responses, and analyze collected data. By having an online survey, the data can be directly downloaded and imported into data analysis software.
- On-site administration for two weeks completed twice a year during high-traffic times, such as the beginning and end of the preschool class. This would allow them to capture a larger number of parents at critical times in their involvement with PB&J and could be used to track how satisfied clients are after a certain length of time.
- Use of audio recording technology to allow participants to share their ideas, experiences, and perceptions with PB&J staff in a manner that is more accessible. This would be done by a staff member who is not familiar with the client to avoid bias. Some parents at PB&J may not feel comfortable with taking either a digital or paper survey. Allowing them to record their thoughts helps those individuals be included in the data collection.

- Provide a different version of the survey every three months to capture a multitude of different perspectives and experiences. This would be done by having a “bank” of possible survey questions to draw from and randomly selecting up to ten questions to use one month, followed by selecting ten more questions the next time the survey is administered (e.x. survey questions 1-10 for January, survey questions 11-20 for April, etc.). This will allow for even more data collection but would limit the length of the survey to make sure it is no too long for participants to complete.

We recommend that PB&J administer the survey both online and on paper to improve accessibility. PB&J staff should offer clients to participate in the survey online by sending a link to the clients phone or offering mobile tech devices on-site where clients can complete the survey. For those not comfortable with online administration, PB&J should offer a paper survey as an additional administration option, particularly for older clients and clients with limited technological experience. PB&J would have to keep track of these paper responses and compile data from both types of survey into their data analysis systems.

Offering participation through audio recording could prove useful to collecting in-depth reviews of particular programs or experiences, but the limits include the use of technology and differences in whether individuals feel comfortable or motivated to record a response in addition to the basic survey may prove difficult to administer, collect, and analyze consistently.



Next Steps

1. Pick an implementation option from above recommendations that best fit the needs of PB&J clients.
2. Pilot the survey and revise based on client feedback.
3. Select a two-week time frame twice during the year to ensure the greatest number of clients can take the survey.
4. Administer the survey to participants of PB&J programs.

PB&J should make the decision about which administration option will work best for them and their target population. Considering accessibility concerns, language barriers, and potential limitations to the current survey questions allows PB&J to assess the quality and usefulness of the survey and make changes accordingly.

Once an implementation option(s) has been selected, the next step for PB&J is to pilot the survey and revise it based on client participation and feedback. By piloting the survey, PB&J can see what worked and make any appropriate changes to better reflect client understanding and experiences. This includes assessing the clarity of the questions, whether the administration is feasible, and whether the questions are capturing the intended information. Having multiple ballots or survey questions to use could allow PB&J to pilot each version and see what questions are bringing in results that they can use.

The evaluation team strongly encourages PB&J staff and management to continue to develop the performance rubrics used in the creation of the survey. Staff identified an additional 15 values, principles, and practices that they believe are important to the work they do at PB&J. While our evaluation did not allow time to fully develop and finalize these performance rubrics, as a step towards building and maintaining internal evaluation capacity our team encourages PB&J to continue to develop and polish the final rubrics for use in evaluating staff performance and to continue their self-evaluation process beyond their participation in the UNM Evaluation Lab.

Acknowledgements: The UNM Evaluation team would like to give special thanks to Jennifer, Felicia, and all PB&J clients and staff for their input that made this evaluation work possible.



Appendix A – Values, Principles, & Practices

- Family Systems Approach
 - Multi-generational
 - Family friendly
- Parent-child bonding (skill)
- Empowerment
 - Self-confidence
 - Breaking negative cycles
 - Strength-based
- Addressing concrete service needs
 - When you walk in the door at PB&J you will be getting help
 - Effective wrap-around services
 - Providing case management to clients
 - Transportation
 - Meals
- Collaborations & Community Involvement
 - Community involvement
 - Collaborating with other providers
 - Collaborations in the community
 - Fun nature activities and community outings
- Communication
 - Good rapport
 - Communicate
 - Effective communication and listening
- Accountability
 - Ensure that clients are served
 - Accountability
 - Go above and beyond for clients' needs

- Relationship Building

- Process of engagement
- Respectful
- PB&J does not prejudge - We are non-judgmental
- Meeting client where they are at
- No judgment
- Building relationships
- Safety
- Safe space/inclusive
- Consistency
- Support system
- Supportive

- Non-judgment
- Patience
- Integrity
- Trust
- Empathy
- Kindness and patience
- Kindness
- Honesty



PB&J
FAMILY SERVICES

Relationship Building

OUTCOME: CLARITY IN GOALS

	Weak	Developing	Achieving	Exemplary
Goal Setting	<ul style="list-style-type: none"> -Lack of training in setting goals -No goals 	<ul style="list-style-type: none"> -Some training in setting goals -Has goals but written by worker 	<ul style="list-style-type: none"> -Beginning to write down multiple goals and takes steps to achieve them -Actively reminds themselves of their goals -Family knows their needs, just acknowledge their priorities -Make sure goals are simple 	<ul style="list-style-type: none"> -Training others in setting goals -Clear knowledge in goal-writing -Problem solves with client -Write down goals with family that they want to work on and help them achieve
Family Goals	<ul style="list-style-type: none"> -Family has no knowledge of goals -Explain to client what a goal is -Family doesn't know that they can hold space for practical goals 	<ul style="list-style-type: none"> -Family has some knowledge of goals -Family doesn't understand goals 	<ul style="list-style-type: none"> -Family knows goals but can't yet tell someone else -Family can identify goals to worker 	<ul style="list-style-type: none"> -Family is creating goals for themselves with the worker's support -Family can identify goals to outside person verbally
Relationships	<ul style="list-style-type: none"> -Client has no idea why worker is in the home -Preconceived notion that client doesn't need help 	<ul style="list-style-type: none"> -Establish some rapport/relationship -Gather some information on the family 	<ul style="list-style-type: none"> -Client is knowledgeable of the support and knows they can depend on the staff for tools and guidance -Develop an understanding of the family and their needs -Sincere smiles 	<ul style="list-style-type: none"> -Client and worker have nearly perfect rapport -Client is more actively independent -Utilizes the relationship with worker to make connections/gain tools, skills to build better life -Never get personally involved with a client, always professionally personable



Relationship Building

OUTCOME: CONSISTENCY

	Weak	Developing	Achieving	Exemplary
Scheduling	<ul style="list-style-type: none"> -Always rescheduling -Frequent cancelations and lack of scheduling -Doesn't inform client of cancelations 	<ul style="list-style-type: none"> -Sometimes confirms meetings -Lots of cancelations ("home visit lottery") -Doesn't inform clients of all canceled visits 	<ul style="list-style-type: none"> -Positive engaging visits with some cancelations -Staff occasionally cancels -Informs client of cancelations 	<ul style="list-style-type: none"> -All visits completed -No cancelations -You get coverage for the visit if you can't attend
Communication	<ul style="list-style-type: none"> -No communication -No follow-through -Unresponsive -Work phone not on/voicemail full -Lack of communication between clients and other team members 	<ul style="list-style-type: none"> -Some communication from staff -Some follow-through -Surface-level interactions -Occasionally checks work phone -Minimal communication between clients and team members 	<ul style="list-style-type: none"> -Consistent communication from staff -Consistent follow-through -Responsive to multiple avenues of communication -Has work phone on during week -Being on the same page with team members 	<ul style="list-style-type: none"> -Interagency communication -Weekly/daily follow-through -Anticipating client needs and adapting to unplanned events -Work phone always on/charged -Communication between multiple service providers
Administrative	<ul style="list-style-type: none"> -Staff doesn't do paperwork -Not enough time to handle admin responsibilities – time management -Is not knowledgeable of expected responsibilities 	<ul style="list-style-type: none"> -Completes initial paperwork -Inconsistent with expected responsibilities -Works on minor assignments 	<ul style="list-style-type: none"> -Completes paperwork in timely manner -Checks in with supervisors regularly and transparently 	<ul style="list-style-type: none"> -Completes all weekly/monthly paperwork -Consistently working in the most helpful, collaborative manner possible



	Weak	Developing	Achieving	Exemplary
Staff Characteristics	<ul style="list-style-type: none"> -Not dependable whatsoever -Doesn't follow through on what they say they are going to do -Crappy ethics -Dishonesty -Doesn't value positive improvement 	<ul style="list-style-type: none"> -Sometimes dependable -Will attempt to do what they say they are going to do -Some ethics on occasion -Sometimes authentic -Kind of cares about positive improvement -Inconsistent 	<ul style="list-style-type: none"> - "Clutch" people, they come through when needed -Accesses resources and does what they say they will do -Ethically sound behavior -Very authentic and transparent -Actively trying to create positive improvement -Good collaboration -Positive attitude 	<ul style="list-style-type: none"> -Doesn't matter the task, they will jump in - "No task is too big or too small" -Team player - Profound, positive helpful behavior - Congruent with helpful values and beliefs -Super inspired to make positive improvements -Self-motivated -Lives self-care and avoids burnout
Scheduling & Availability	<ul style="list-style-type: none"> -Unable to make face-to-face contact -Doesn't make scheduled visits and not showing up -Blaming the client for cancelling -Constantly meets and leaves others in a state of conflict 	<ul style="list-style-type: none"> -Unable to reach out to others -Will schedule and sometimes show up -Shows up but does not address the client's needs -Unavailable to clients, either physically or mentally 	<ul style="list-style-type: none"> -Utilizes team support -Will schedule and attend visits, but doesn't schedule next visit -Addresses needs but not provide any additional resources -Seeing clients regularly and meeting their needs timely 	<ul style="list-style-type: none"> -Attends scheduled visits and schedules for next time -Finds more resources -Takes clients to appointments, helps them schedule -Helps clients clean their house
Work Performance	<ul style="list-style-type: none"> -Not producing documentation or completing evaluations -Argumentative 	<ul style="list-style-type: none"> -Poor documentation, or poor quality of work 	<ul style="list-style-type: none"> -Able to meet deadlines, if not there is communication 	<ul style="list-style-type: none"> - "Being ahead of the game" or ahead of deadlines -Picking up phones on weekends, going out of their way to help in an emergency -Answers alarm calls

	Weak	Developing	Achieving	Exemplary
Staff Behaviors	<ul style="list-style-type: none"> -Judging people by their past, treating them as if they are the same person -Refusing to work with family due to family dynamics -Educating others in a way that makes them feel stupid 	<ul style="list-style-type: none"> -Using clients' past to make assumptions about their current situation -Making minimal efforts to get to know the client -Educating them in a way that may lead to self-doubt 	<ul style="list-style-type: none"> -Doesn't hold clients past against them/doesn't look at the past -Listening with empathy to get to know the client -Educating them in a way that empowers the client 	<ul style="list-style-type: none"> -Sees client's past as a source of potential, or doesn't look at past files -Listening with empathy, holding space, and making clients feel truly cared for -Educating the client in a way that helps them uncover their own strengths, thereby empowering them and building self-confidence
Staff Reactions	<ul style="list-style-type: none"> - Being verbal about not wanting to be in the home -Open expressions of disgust - Being condescending to others -Telling clients or staff they are terrible 	<ul style="list-style-type: none"> -Minimum engagement -Some sympathy maybe -Makes too many excuses 	<ul style="list-style-type: none"> -Using case file to be respectful - Domestic Violence situations: No victim blaming - Open to learning 	<ul style="list-style-type: none"> -Create a safe environment where clients can be themselves and honest -Put aside preconceived notions of someone regarding personal appearance -Praise efforts and hard work -Discuss failures as part of progress
Staff member says things like:	<ul style="list-style-type: none"> - "You shouldn't have worn that today" - "You chose drugs over your kids" - "All drug users are the same" - "I don't want to be here because you just got out of prison" - "People don't change" 	<ul style="list-style-type: none"> - "Do you think it's too hot/cold for that today?" - "You picked up your house some, but still needs lots to do" 	<ul style="list-style-type: none"> - "I like what you are wearing, where did you get it?" 	<ul style="list-style-type: none"> - "You look amazing! I love how it brings out your eyes"



Relationship Building

OUTCOME: OPEN COMMUNICATION

	Weak	Developing	Achieving	Exemplary
Scheduling & Meetings	<ul style="list-style-type: none"> -Will no call, no show, cancel half of visits -Difficult time in rescheduling 	<ul style="list-style-type: none"> -Confirms visits but later “no shows” or cancels -Only contacts clients for cancellations -Calls but doesn’t leave messages -Keeping majority of scheduled visits 	<ul style="list-style-type: none"> -Calls to clarify and returns calls in reasonable time -Commits to scheduled meetings or visits -Keeps all scheduled visits -Mainly face-to-face visits to promote relationship 	<ul style="list-style-type: none"> -Anticipating best method to communicate with clients to confirm appointments -Utilizing multiple resources to ensure constant communication (EX: appointment reminder cards, phone calls)
Responsiveness	<ul style="list-style-type: none"> -Constant Distractions from cell phone, client and/or staff -No responses to phone calls or texts 	<ul style="list-style-type: none"> -Will call a few days later -Ongoing communication with clients to schedule appointments 	<ul style="list-style-type: none"> -Calls and will leave voicemail or text -Will return calls in a timely manner -Constant and regular communication with clients -Available for face-to-face communication consistently 	<ul style="list-style-type: none"> -Leaves message and/or texts promptly -Maintaining boundaries with clients while remaining available to them -Anticipating client’s needs and responding in individualized way
Supervision	<ul style="list-style-type: none"> -No response to supervisor -No response from supervisor 	<ul style="list-style-type: none"> -Utilize weekly supervision as a tool 	<ul style="list-style-type: none"> -Communicates with supervisor in all appropriate circumstances -Gives regular updates independently to supervisor -Aware of available tools and resources 	<ul style="list-style-type: none"> -Communicates with supervisor and follow up -Primarily has supervisions in person



	Weak	Developing	Achieving	Exemplary
Staff Behaviors	<ul style="list-style-type: none"> -Disregards family issues and struggles -Approaches things in judgmental way -Does not listen to client's needs 	<ul style="list-style-type: none"> -Shows up but doesn't address needs -Helps family but judges while doing so -Inappropriate expectations (ex: having client give rides to staff) -Oftentimes will listen to clients 	<ul style="list-style-type: none"> -Address immediate safety needs -Get bus passes, Explora passes, zoo passes, etc. for clients -Does listen but doesn't use information to support the family -Engaged during staff meetings 	<ul style="list-style-type: none"> -Immediately acts on safety concerns -Accepts client in the state that they are but offers consistent constructive suggestions -Listens, discusses, problem solves, and gets to know the client -Transport clients to appointments
Family Connection	<ul style="list-style-type: none"> -No involvement from family members other than child or maybe one parent -Doesn't know how to engage with clients 	<ul style="list-style-type: none"> -Some regular involvement from parents -Don't know how to engage at that level/ avoid conflict-reaction 	<ul style="list-style-type: none"> -Half conscious, half going through the motions on a day-to-day basis -Engage with the child from the start 	<ul style="list-style-type: none"> -High level of participation from everyone in the child's family -Achieved self-sufficiency with families
Outreach	<ul style="list-style-type: none"> -No outreach activities -Anti-social, standoff attitude and behavior 	<ul style="list-style-type: none"> -Some outreach activities -Tabling at flea markets -Take blocks or toys to evaluate child 	<ul style="list-style-type: none"> -Tabling at social justice events, community events -Clients are checked in with regularly 	<ul style="list-style-type: none"> -Constant outreach -Has a great relationship with clients, community members, institutions, and local nonprofits -Actively helps numerous people in our community -Achieve relationship with providers in the community for extended periods of time



	Weak	Developing	Achieving	Exemplary
Safety Planning & Monitoring	<ul style="list-style-type: none"> -Not doing visits in general -No safety planning, doesn't address concerns adequately -Allowing unsafe behaviors from caregivers -Situational awareness is lacking -No bus safety checks -Ignoring or allowing safety concerns 	<ul style="list-style-type: none"> -Only doing 1 out of the required 4 visits -There is a safety plan but vague, not followed -Being passive about concerns, not addressing outright -Having a sense of awareness with certain clients, but not enough -Sporadic bus safety checks -Not addressing concerns outright 	<ul style="list-style-type: none"> -Doing all required visits -Safety plan is updated, concrete with enough action steps -Recognizing concerns and reducing or eliminating issues -Having an awareness every visit, paying attention & engaged (client and staff) -Bus safety checks 	<ul style="list-style-type: none"> -All visits completed, engaged in follow up -Safety plan practiced and reviewed, with high-level of follow up - Safety concerns solved - Acknowledges and follows through with mitigating concerns -Goes out of way to ensure client safety
Reporting	<ul style="list-style-type: none"> -Not reporting safety concerns when necessary -Not reporting to SCI -No communication with CYFD about concerns -No communication between staff about safety concerns 	<ul style="list-style-type: none"> -Acknowledging concerns minimally -Selective reporting to SCI -Sporadic/occasional communication with CYFD -Brings up concerns 	<ul style="list-style-type: none"> -Reporting of all safety concerns -Reporting all concerns to SCI -Communicates with CYFD regularly -Written communication about safety concerns 	<ul style="list-style-type: none"> -Reporting all concerns in a timely manner -Utilizing additional resources by making referrals -Communicates with CYFD and other service providers -Networking with other agencies about concerns
Boundaries	<ul style="list-style-type: none"> -Lack of boundaries between staff and client 	<ul style="list-style-type: none"> -Inconsistent boundaries between staff and client 	<ul style="list-style-type: none"> -Clear and established boundaries between staff and client 	<ul style="list-style-type: none"> -Anticipating issues with boundaries and seeking supervision



	Weak	Developing	Achieving	Exemplary
Supportive Actions	<ul style="list-style-type: none"> -Does not care about others -Not reliable -Barely responsive to clients -Non-communication -No trust -No forms of supports known 	<ul style="list-style-type: none"> -Staff hold some space, are “just there” for their clients -Somewhat reliable -Somewhat responsive to clients -Knows few helpful supports in community -Little trust -No work phone 	<ul style="list-style-type: none"> -Clients can depend on staff most of the time -Reliable, responsive to clients most of the time -Utilizing supports in the community through referrals -Being available to clients when they reach out to you 	<ul style="list-style-type: none"> -Being available outside of business hours -Staff consistent through check ins and follow up -Has built great rapport with assigned families -Buying diapers or formula on Sunday for a client -PB&J helps create solid support system, allowing clients to build resilience
Staff member says things like:	<ul style="list-style-type: none"> - “If you need help doing this you aren’t ready” - “You can go get that done on your own” 	<ul style="list-style-type: none"> - “Is there anyone that can help you take care of that?” - “I’m only going to help this one time, you should be able to do this” 	<ul style="list-style-type: none"> - “I can help you with that, when is a good time to go or meet?” 	<ul style="list-style-type: none"> - “I’ll help! Let me come get you and we’ll go together, or we’ll work on it together” - “Sometimes making that phone call can feel like too much. I will call them with you here and we can do it together”



	Weak	Developing	Achieving	Exemplary
Communication & Responsiveness	<ul style="list-style-type: none"> -Client schedules then last minute cancellations -Family has no knowledge of goals -Lack of communication between clients and other team members -Clients feel judged/undeserving when coming for help -Does not discuss needs or issues 	<ul style="list-style-type: none"> -Client stays connected by phone when having to cancel -Family has some knowledge of goals -Family doesn't understand goals -Minimal communication between clients and team members -Some guardedness, limits disclosure -Will communicate as needed 	<ul style="list-style-type: none"> -Client calls and leaves messages -Family can identify goals to worker -Being on the same page with team members -Using support system when feeling like relapse may occur -Open (willing) to discussion and/or disclosure -Open to disclosure and discussion -Client is specific about what he/she needs 	<ul style="list-style-type: none"> -Follow through from the family -Family is creating goals for themselves with the worker's support -Family can identify goals to outside person verbally -Open and accepts support
Home Visiting	<ul style="list-style-type: none"> -Parents nod in and out during visit -No involvement from family members other than child or maybe one parent -Child is left unattended -Client has no idea why worker is in the home -Constant Distractions from cell phone 	<ul style="list-style-type: none"> -One parent is nodding out, one is not -Some regular involvement from parents 	<ul style="list-style-type: none"> -One parent is engaged; one is doing own thing but paying attention 	<ul style="list-style-type: none"> -All are involved, present, and listening to safety reviews/concerns -High level of participation from everyone in the child's family
Outcomes	<ul style="list-style-type: none"> -Educating clients in a way that makes them feel stupid 	<ul style="list-style-type: none"> -Educating clients in a way that may lead to self-doubt 	<ul style="list-style-type: none"> -Educating clients in a way that empowers the client 	<ul style="list-style-type: none"> -Educating clients in a way that helps them uncover their own strengths, thereby empowering them and building self-confidence -Create a safe environment where clients can be themselves and honest



Appendix C – Focus Group Consent & Protocol

UNM EVALUATION LAB

Informed Consent for Focus Groups

To be read out loud to participants:

Hi, my name is Emily. And I'm Jessica and we are Master's students at UNM. This is Gabby, and she is here to help translate for us. Emily and I do not speak Spanish, but we wanted to make sure that you all have the chance to respond in the language you feel most comfortable in, so we will be taking notes while Gabby helps to translate.

We are working with PB&J as part of the UNM Evaluation Lab.

The UNM Evaluation Lab works with organizations like PB&J to help them figure out how they are doing and where they might be able to improve.

PB&J is interested in understanding how participants experience its programs, and how clients describe their interactions with PB&J staff members.

The focus group will take about an hour.

Your participation in any activity or question we ask is voluntary.

We will take notes and audio record the discussion to make sure we understand what you said, but we are not going to keep names, and we won't share the recording with PB&J.

If anyone would rather we not record, we won't! We will check in with you along the way.

We might use the information from this group to help PB&J understand how they're doing in its services and maybe use a quote or two, but we won't include names or identifying characteristics.

If you have any questions about this evaluation project, or the Evaluation Lab, you are more than welcome to contact our instructor at the contact information posted here.

Does anyone have any questions?

Protocol:

[1:00] Welcome & Consent Form – Thank everyone for joining the session. Read the Evaluation Lab’s Consent Form for Focus Groups and ensure that everyone present wants to participate.

[1:05] Activity 1 – Individual Answers: A. Give a specific example of a positive interaction you have had with a PB&J staff member. B. Give a specific example of a negative interaction you have had with a PB&J staff member.

In this activity, we will give you some green and pink papers to write down stories of interactions you have had with a PB&J staff member. On the green papers, please write down a story of a positive interaction you’ve had here and on the pink ones, please write down a negative interaction you’ve had.

Be as specific as possible but try not to include names or other details that can be linked back to a certain person. The purpose of this activity is to see the types of words and phrases that are used at PB&J that make someone feel good or bad. Once everyone is done, I’ll ask for just a few volunteers to share their examples.

After 8 minutes Please start wrapping up your thoughts and write down anything else you would like to add.

After 10 minutes [1:15] - Can someone please share what they wrote as an example of a positive interaction? Can someone please share his or her example for a negative interaction? What stands out to you?

[Goal: Understand specific actions and words that make interactions positive.]

[1:20] Activity 2 –Gingerbread People: How do you feel before and after a positive interaction with a staff member?

I am going to pass around some blank images of gingerbread people with a line down the middle. Using the gingerbread person, please illustrate how you feel before and after a positive interaction with a PB&J staff member. Draw the before on the left side of the gingerbread person and the after on the right side. You can draw symbols or write words or phrases but be sure to make it personal to you and feel free to get creative with the colors at your table. If you decide to do mostly drawings, please describe your drawings with words or short phrases on the page so we can interpret them later. For example: On the before side I drew untied shoes, and on the after my shoes are tied. On the back I might write that before the interaction I felt unprepared, but afterwards I feel ready to go. You’ll have a few minutes to decorate your gingerbread man and then I may ask one or two volunteers to share.

After 8 minutes Let’s start wrapping up our ideas and then we will do a quick share.

After 10 minutes [1:30] – Would anyone like to share what they came up with?

[Goal: Understand how clients feel after a positive interaction with a staff member.]

[1:35] Activity 3 – Brainstorm what makes a satisfied client, a successful service, and a good interaction.

Now we want to have a discussion with you all about how you experience PB&J Services. We will ask you a few questions and feel free to shout out your responses as we go. There are no right or wrong answers.

1. *What could a staff member do or say to you that would make you want to come back to PB&J?
Potential Probes – what specific words or phrases? Can you give me an example?*
2. *What could the staff member do or say to make you not want to come back?*
3. *Thinking of the services you use the most or the service that has helped you the most, what about that program made it successful?*

4. *If they were to continue providing that service to others, what would make it more successful?*

[Goal: Learn client perspective on what makes a good PB&J staff member.]

[Goal: Learn client perspective on what makes PB&J services successful.]

[1:55] Conclusion of focus group – Thank participants for their time and let them know if they can expect to receive a copy of the results/findings/report.

CLIENT SURVEY



Please think of the staff member(s) you work with the most.

1. I would describe the staff member as (circle all that apply):

Open- Minded	Reliable	Unreliable	Trustworthy
Discriminatory	Helpful	Friendly	Rude
Non-Judgmental	Positive	Honest	Dishonest

2. The staff member makes me feel (circle all that apply):

Like I come first	Motivated	Like a good parent	Isolated
Unwelcome	Respected	Confused	Involved
Comfortable	Positive	Hopeful	Discouraged
Like anything is possible	Welcome	Supported	Like a bad parent

3. How much did the staff member help you with:

	Not at all	A little	A lot
Getting the information I needed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tips on parenting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tips on budgeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tips on managing family conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tips on dealing with stressful situations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dealing with legal services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finding my positive self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taking a bad day and making it good	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. How often did your staff member do the following:

	Never	Sometimes	Almost Always
Greeted me when I came in	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complimented me or my children	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canceled meetings or groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Questioned my parenting abilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modeled good parenting skills and practices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provided transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gave me additional resources or information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Went with me to appointments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provided necessities (diapers, food, supplies, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Connected me with other providers or services (counselors, daycare, education, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Overall, how would you rate the staff member? (Mark on the slider scale to match your rating.)

