Collecting and using consumer feedback effectively: Designing your approach

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If you wish to cite this document, please use the following notation:

Pascale, K (2024) *Collecting and using consumer feedback effectively: Designing your approach*. *Version 2*. Kate Pascale and Associates Pty. Ltd. Melbourne, Vic.

The *ESDT Consumer Feedback Toolkit* is also available electronically. Microsoft word versions of some tools have also been created so they can be used electronically.

https://www.esdt.com.au/
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There is no 'one size fits all' approach or tool that allows you to collect useful consumer feedback. Good planning is the key to success!

This resource outlines the key considerations that should help you design a consumer feedback strategy that is tailored to meet your needs, appropriate for your consumers and feasible within the time and resources available.

The Consumer feedback toolkit also includes resources that relate specifically to designing and implementing surveys, focus groups and in-depth interviews. They include detailed information about the strengths and weaknesses of each approach and how they can be structured and delivered to maximise their value. Please refer to the following:

- ***'Developing consumer surveys'*** and ***'Consumer survey tools and templates'.***
- '***Conducting focus groups with consumers'*** and ***'Consumer focus group tools and templates'***.
- ***'Conducting in-depth interviews with consumers'*** and ***'Consumer interview tools and templates'***.

Introduction

There are a range of ways to collect consumer feedback. Each approach has different advantages and disadvantages and can provide valuable information, when used appropriately. The way you design your approach and tools has a significant impact on the quality and usefulness of the feedback you collect. Good planning puts you in the best possible position to collect the right information from the right people at the right time.

It is our responsibility to create opportunities for consumers to provide feedback about issues that are relevant to them. We should provide consumers with choices that enable them to provide feedback in whatever way suits them best.

A successful consumer feedback strategy is reliant on:

- **Collecting information from the right people.**
- **Using appropriate tools and strategies to collect and analyse the feedback.**

The four golden rules for consumer feedback strategies

- Don't ask for feedback if you don't intend to act on it.
- Be clear about what you're trying to achieve (your purpose).
- Plan what you are going to do.
- Define your scope (what is feasible).

Clearly articulate your purpose

Before you can decide HOW to collect feedback, you must understand WHY.

Before you do anything else, write a purpose statement that describes why you are collecting feedback.

Having a clear purpose helps to focus on what's important and design an effective and efficient approach. It will allow you to prioritise questions, develop appropriate tools, and design strategies to collect and utilise feedback in meaningful ways.

It's unrealistic to try and develop a consumer feedback strategy that is 'all things to all people'. When people don't have a clear purpose, they often try and squeeze a little bit of everything into a survey. This leads to confusing questionnaires which generate vague responses that aren't useful to identify opportunities for improvement.

Your purpose will be dependent on who needs the feedback and how it will be used.

How will the information be used?

Right from the beginning, keep in mind what your 'end product' or deliverable will be. This will guide the type of information required, who you need to collect feedback from and define your priorities.

Example:

If you want to write an article for your local newspaper to generate interest in your Tai-chi classes, it may be useful to collect some quotes from your current clients about their experience and the benefits they've gained since joining the Tai-chi class.

If you are writing a funding submission to expand your program, your priority may be to demonstrate the need for Tai-chi, create tangible evidence of the demand for additional classes or to illustrate a gap in current services. Collecting feedback from potential clients (i.e. people eligible to attend your TaiChi classes) would be most useful.

If your manager requests information about your Tai-chi program to include in the Annual Report, before you decide how to collect the feedback, you need to clarify the type of information they are looking for (e.g. narrative client stories or statistical information that would be presented in a table etc.).

Once you have clearly defined your purpose, design your approach and tools accordingly to maximise your ability to collect meaningful and relevant information.

Who will use the feedback that you collect?

Consumer feedback can be useful to a broad range of stakeholders, however each person or group will have different priorities. It's essential to understand your audience before you launch into designing tools or writing questions. Think about:

- **Who is going to use the feedback?**
- **How will the feedback be used?**
- **What information will be most relevant and meaningful to support them achieve this?**

Once you understand who will use the feedback, you can tailor your approach accordingly.

Wherever possible, include the relevant stakeholders (or a representative person/group) in the planning process.

Example:

When conducting a review of your delivered meals program, consumer feedback may be useful for a range of audiences, including:

- **Staff members directly involved in coordinating the program and delivering meals.**

  Staff may seek information from their current clients about the quality of meals being delivered or how satisfied they are with the delivery schedule etc. They may also collect feedback from a group of past clients and carers, to understand whether there are certain features of the program, or client attributes that are shared among people who cancel their meals service within the first four weeks.

  Given their direct involvement in the program, it's unlikely that staff would need to collect detailed feedback from consumers to understand what the delivered meals program involves, how it operates or the value of the service.

- **Senior management or your Board of Management.**

  As they are removed from the day to day running of the program, your executive group may not understand the detail of the program and its features. Consumer feedback can therefore be useful to 'paint a picture' of their experience of receiving delivered meals and the difference it makes for them.

  Creating case studies or client stories can be a powerful way to build people's understanding of the value of a program and/or the rationale behind programming decisions.

- **Potential clients or volunteers.**

  They may review feedback from other delivered meals clients and carers on your agency's website when making decisions about which service is right for them.

  Learning about other people's experiences can also be useful to create a sense of community, or shared experience, which can help to motivate potential clients, reduce fears or dispel myths. These stories could also be a powerful tool to recruit volunteers who want to contribute to a valuable local service.

Every consumer feedback strategy should be designed to collect specific information, from a clearly defined group of consumers at a particular time.

Designing your data collection strategy

Your approach must be informed by the needs of your consumers and should provide opportunities for everyone to provide feedback in an appropriate and meaningful way. To achieve this, you need to think about:

- **Who you need to collect information from.**
- **When you need to use the feedback/timeframes.**
- **What information you need.**
- **The resources available to support you.**

This list is not hierarchical. As long as you are guided by your purpose and the needs of your consumers, you can be flexible about how you address and prioritise these factors.

This resource expands on each of these points and provides prompts about the issues to consider.

Example:

When you are working to a strict deadline, your approach will be determined by what is feasible to achieve within the time and resources available. Depending on your purpose, you may need to increase your budget, limit the amount of information you collect, or the number of consumers you speak to.

Alternatively, you may need to collect feedback from a group who has been difficult to engage in the past. Therefore, your priority may be to collect information from those consumers within their existing appointment times. This will effect the type and amount of information that you can collect.

A worksheet has been included in this resource that allows you to document each step of the planning process. This can be used to assist you brainstorm or to demonstrate the rationale for the consumer feedback strategy you ultimately choose. You should not start designing tools or writing questions until you can confidently complete each element of the worksheet.

Please see page 27 for the '***Worksheet: Designing your approach***'.

Who do you need to collect feedback from?

Remember that consumers are not your only source of information. There may be other people who are better placed to provide you with relevant feedback or other ways to collect the information you need.

Collecting feedback from the right group of consumers is essential! You need to be very clear about who your target group is and design your strategy around what matches their needs and expectations.

Define your target group

Consumers can include past, current or potential clients and carers. For many services, potential consumers may include a broad section of the community. You need to determine which consumers are able to provide the feedback you need to meet your purpose and make appropriate decisions. To do this, you should:

Identify the specific characteristics of the consumers you need feedback from

Define the features of the group including shared experiences or characteristics that enable them to provide you with relevant feedback.

Example:

You want to collect feedback about how useful your online appointment booking system is.

Your target group is limited to clients and carers who have used the online appointment booking system. People that haven't used the system can't provide meaningful feedback.

Consider whether the feedback you collect needs to be representative of a broader group

If so, you must collect feedback from consumers who are representative of that group. You need to consider the demographics and characteristics of everyone in your target group and ensure that the people you speak to, match those characteristics. That way, you are able to make more accurate estimations about what the results would be if you collected feedback from the entire group.

Example:

You want to understand local teenagers' experience and attitudes about underage drinking.

If you only collect feedback from people attending high school, you will exclude large groups of teenagers (e.g. those that have left school, are home schooled etc.) and your sample will not be representative of the views of all local young people.

Collect feedback directly from the source

Consumers should only be asked to provide feedback about their own experience, opinions, behaviour or feelings. It is not appropriate to ask a person for feedback about how someone else feels or thinks.

While this is relevant to everyone, it is commonly overlooked when people don't speak English, experience communication difficulties, intellectual or cognitive impairments.

Example:

You want to collect feedback about ways to improve your Social Support Group.

Due to his dementia, your client Bob is unable to participate in an interview, so you decide to invite his wife Wendy instead. Carers are an important consumer group and including Wendy's feedback will be valuable to inform your ongoing planning. It's important to remember though, that during the interview with Wendy, you can only collect feedback about her own experience, explore how she feels and ask for Wendy's suggestions about opportunities for improvement.

It would not be appropriate to ask Wendy:

'What does Bob enjoy most in the group?'

'What would make Bob's time in the group more enjoyable?'

Only Bob can answer these questions. It is not appropriate for you, other staff or Wendy to make assumptions about how Bob thinks or feels.

Understand the needs of your target group

Your first priority is always to protect the safety and wellbeing of your consumers. It's important to identify the specific needs of your target group, consider potential barriers or challenges and strategies that will support them to participate effectively.

Your approach must be informed by the needs of your consumers, ensuring that you create opportunities for everyone to provide feedback in an appropriate and meaningful way.

Consider your consumers' strengths, experience and abilities

The table below includes a range of factors that can impact on a person's ability, confidence and motivation to provide feedback. This list is not exhaustive, but should provide you with some ideas about the issues to consider.

Personal Characteristics	Function/Skills	Circumstances
• Age. • Gender. • Culture. • Values and beliefs. • Knowledge/education. • Preferences. • Previous experiences.	• Vision. • Hearing. • Cognition. • Language and literacy. • Mobility. • Communication style/needs. • Physical abilities/disability.	• Availability/time. • Transport. • Roles and responsibilities (e.g. carer/parent/work/school). • Finances and resources. • Geographic location.

Do not assume that any group of people are homogenous. There is diversity within every group.

Identify appropriate ways to reach and engage your consumers

Consider how you can overcome potential barriers and make it as easy as possible for **everyone** in your target group to provide feedback. Think about how you can design a strategy that is:

- **Respectful of your consumers beliefs, culture, skills and circumstances.**
- **Culturally appropriate.**
- **Meaningful and relevant.**
- **Inclusive.**
- **Appropriate, safe and engaging.**
- **Accessible and convenient.**

Example:

You want to collect feedback from Aboriginal women about their experience working with your service and opportunities for improvement.

To ensure your approach was culturally appropriate, it would be valuable to develop your strategy and tools in consultation with local Elders, community leaders and/or experts. Some key considerations would include the language and literacy skills of the women in your target group and the acceptability and relevance of your questions. For many Aboriginal women, it would be inappropriate and embarrassing to discuss issues related to their health, or healthcare with a man. Ensuring that participants had the option to choose the gender of the staff member they provide feedback to, would be essential.

Collect feedback in a range of ways so that everyone in your target group has an opportunity to participate.

Put yourself in your consumer's shoes:

- What information would be appropriate to collect?
- How would you react to being asked sensitive questions?
- What would encourage or support you to provide feedback?
- How much time would it be reasonable to spend providing feedback?

Sometimes compromises need to be made and it's not possible to collect feedback from everyone. If this is the case, consider other ways that you could understand relevant issues (e.g. by speaking with community experts or utilising existing research) and acknowledge the limitations of your approach when you report your findings.

Working with consumers to plan and develop consumer feedback tools is the most effective way to ensure that they are relevant and appropriate.

Determine the number of people you need to collect feedback from

The number of people you need to collect feedback from is commonly referred to as your '**sample size**'.

A range of sample size calculators are freely available online, however these are most relevant for use in formal research initiatives, where formulae are used to interpret the potential generalisability of the findings. Adopting a more pragmatic approach is reasonable to support ongoing quality improvement … as long as you can justify your decision!

Keeping in mind your purpose and the needs of your consumers, your sample size will be influenced by a number of factors including:

- The size of your target group (how many people you have to choose from).
- Whether you need to generalise the information you collect to a broader group.
- How likely it is that the people you invite to participate, will provide feedback (your anticipated response rate).
- The type of information you need to collect.
- The time and resources you have available.

Collecting feedback from more people, doesn't necessarily equal better results!

Example:

You want to collect feedback about the Community Lunch Program you run for older people.

- If you want to understand what would encourage older people to attend the program, your target group is everyone aged over 65 years who lives in Partytown (i.e. all potential clients). It is unrealistic to speak to everyone that meets those criteria. You would therefore need to consider why you are collecting feedback (i.e. your purpose), when the information is required, your budget and opportunities to engage with people who are representative of the group to determine a feasible sample size.
- If you choose to post surveys out to members of the local U3A, Senior Citizens, RSL and Probus Clubs, you would also need to factor in how likely it is that people will respond. The average response rate to personalised postal surveys is around 20–25%. Therefore, if you want to collect a minimum of 100 responses, you'd need to post around 400–500 surveys out to local club members.
- If you want to collect feedback about the new menu that you've introduced, your target group is the 20 people who currently attend the group. Given the small, defined group, it should be feasible to speak to most, or all, of your current clients. Your response rate will be significantly higher if you can ask for feedback while they're already at lunch.

References

ABS (2023) *Sample size calculator*. Australian Bureau of Statistics (ABS), Canberra

SA Health (2021) *Engaging with Consumers, Carers and the community: Guide and Resources*. SA Health, Government of South Australia, Adelaide

Fudge, N., Wolfe, C.D.A, McKevitt, C. (2007) *Involving older people in health research*. Age and Ageing Volume 36(5) p.492–500

Edwards et. al. (2023) *Methods to increase response to postal and electronic questionnaires*. Cochrane Database Syst. Rev. 2023 (11) MR0000008

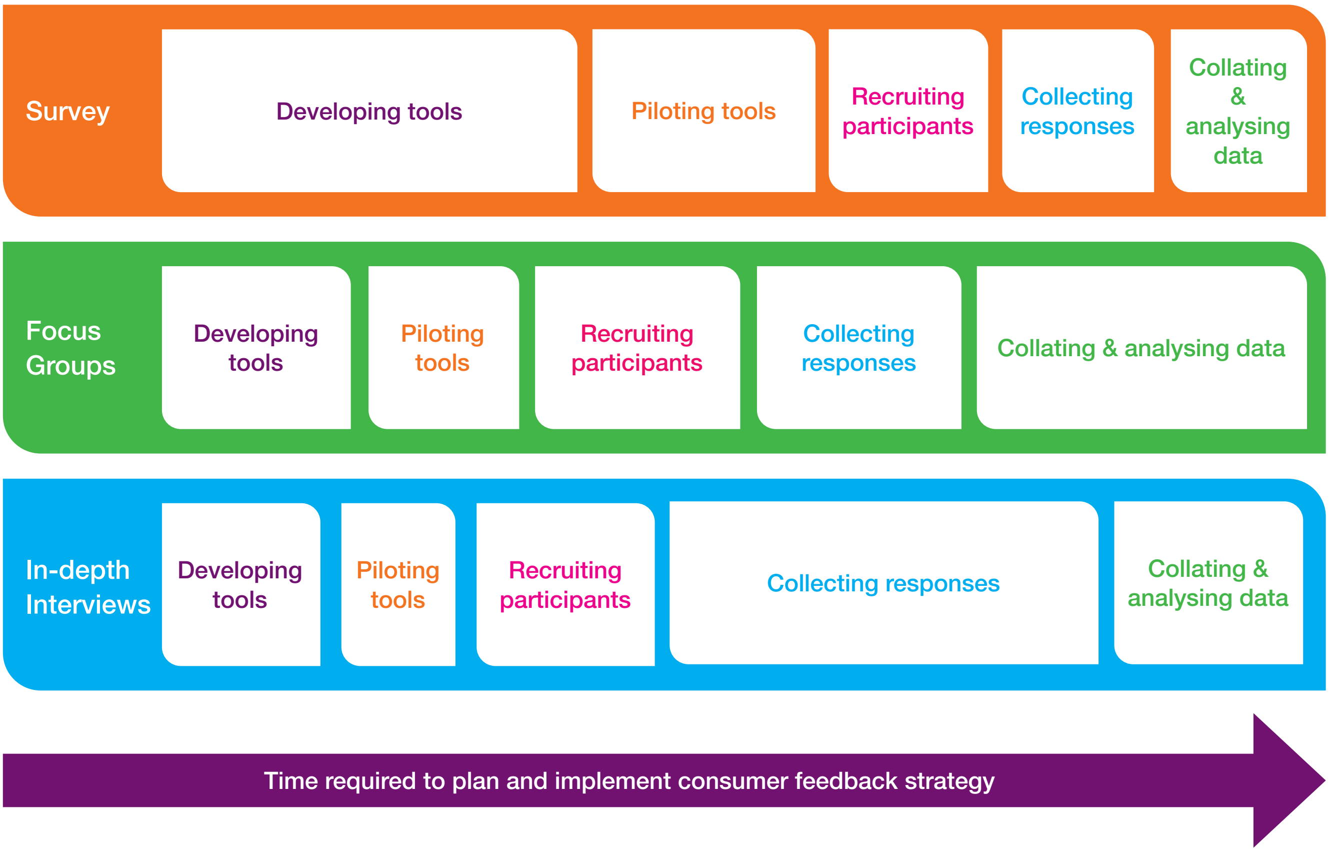
Queensland Government's Statistician's Office (2019) *Survey methods: Sources of Error, bias and accuracy*. Queensland Government, Queensland Treasury, Brisbane.

How much time is available for you to collect feedback?

When considering your timeframes, factor in the time required to complete each step of the process including:

- Designing your approach and tools.
- Piloting your tools.
- Finding and recruiting consumers (including survey distribution).
- Collecting your responses (including data entry).
- Collating and analysing the data.
- Writing relevant reports.

The amount of time required for each step varies significantly depending on the way you collect feedback.



NB: This diagram is only intended as a conceptual representation of the comparative time required for each phase of the consumer feedback strategy.

When you're working to a set deadline, it can be useful to plan backwards. Start with your due date and then consider the amount of time required for each step and create a schedule.

Staff often assume that a written survey is the most efficient way to collect consumer feedback. While surveys can be distributed to a large number of people quickly, they require significantly more time to plan, design and pilot. Also, when you complete paper based surveys, there is often a delay while you wait for the surveys to be completed and returned.

The flexible, one-on-one approach adopted in interviews means that initial planning is relatively easy and fast, however it can be time consuming to conduct the interviews and collate the information.

Scheduling and coordinating focus groups takes some time, but the group environment allows you to collect indepth information from a number of people and identify trends and differences relatively quickly. It can be very time consuming to collate and analyse feedback collected in groups if verbatim transcripts are required.

Example:

You're asked to make a presentation to your Board of Management in 4 weeks about the value of your program.

Your strategy will therefore be determined by what is feasible within this timeframe (and the amount of time you can dedicate to it over the next 4 weeks). It's unlikely that you would have time to develop, draft and pilot an online survey, post written information out to people or conduct complex qualitative data analysis.

The most efficient strategy would be to collect information from consumers during existing appointments or meeting times (e.g. via activity based surveys or by asking every client you worked with in one week a couple of survey or interview questions).

If you don't have regular contact with the relevant consumers, phone surveys may be the most effective and efficient way to collect feedback.

Alternatively you may choose to engage an external person, who has the expertise and capacity to collect, analyse and report the information in a different way.

Make the most of existing opportunities

Think about ways that you can integrate opportunities to collect feedback into other activities. This allows you to collect information quickly and easily, making the survey process less of a burden for you and your consumers. Think about:

- Asking survey questions face to face, as part of a client's appointment.
- Conducting a focus group within an existing group session.
- Setting up activity based survey questions that can be completed as consumers complete the task you'd like to collect feedback about.

Additional information about ways to streamline processes and collect feedback opportunistically are included in the following resources:

- ***'Developing Consumer Surveys'***.
- ***'Conducting Focus Groups'***.
- ***'Conducting In-depth interviews'***.

What information do you need to collect?

The approach you choose will largely be determined by the nature of your questions, the depth of information required and the complexity of the topics you need to collect feedback about. It's important to understand the strengths and limitations of different approaches and design an approach that is achievable and 'fit for purpose'.

Approach	Strengths	Weaknesses
Surveys	• Structured format enhances the consistency (and therefore reliability) of information collected and the potential generalisability of your findings across a broader group of consumers. • Can be administered at different points in time to track change. • Can be completed anonymously which can increase likelihood that consumers will provide honest feedback.	• Consumers often provide brief/vague answers. Difficult to capture information or explanations about 'why' participants have answered in a certain way or the context of their responses. • There is no opportunity to 'probe' for clarification /expansion (particularly for written surveys). • Unreliable when asking about people's past experiences (surveys are designed to collect information about the 'here and now').
Focus groups	• Allow you to understand a variety of experiences and opinions which creates a detailed understanding of what participants are thinking and feeling. • Can quickly identify common themes and points of difference. • Group discussion encourages people to reflect on their own experiences and share their perspective. • Can reinforce a sense of shared experience, where people feel validated and safe to share their ideas or experiences with their peers.	• Difficult to collect sensitive or personal data. • Limited generalisability – you cannot assume that the participants views, represent your entire population. • Existing relationships and dynamics between individuals can influence the information provided. • Not a valid way to find out how much progress an individual client or participant has made toward his or her own goals.
Interviews	• Provide a comprehensive understanding of an individual's perspective and what's important to them. • Semi-structured approach allows the interviewer to clarify information, ask follow up questions and probe for further detail to gain a deeper understanding of key information. • Allow you to explore potentially sensitive information in a safe and confidential environment. • Consumers may feel more comfortable providing feedback in person or one-on-one (rather than via a survey or group setting).	• Results can be biased by the interviewer or participant being invested in particular outcomes, the participant feeling pressure to provide correct answers, or the relationship between the interviewer and the participant. • Results are not generalisable (i.e. you can't assume that your participant's views/experience are shared by others or representative of your population).

The following key questions should assist you to clarify and prioritise the information you need to collect.

What information is already available?

Consider the information you already collect in the normal day-to-day operations of your program such as:

- Client registration information.
- Intake and assessment information.
- Client and carer goals and care plans.
- Attendance lists and process information.
- Progress notes and other documentation.
- Consumer compliments and complaints.

Don't ask people questions that you already know the answer to.

Consider whether there are other sources of information that could provide you with the information you need. This may include existing research or evidence, public data sets or information from other stakeholders.

What information is essential and what would be 'nice to know'?

Before you start writing any questions, go back to your purpose statement and prioritise the information that you need.

Make sure every question is necessary and relevant. Don't ask people questions unless you are able to use their feedback to make change.

What type of information do you need?

The type and depth of information that you collect depends on the approach you choose.

Qualitative vs quantitative data

Information is often categorised as either qualitative or quantitative data.

Qualitative information relates to the qualities of something, so it is usually descriptive.

Quantitative information relates to the quantities and is used to measure definitive counts and measures.

Qualitative information is useful to:	Quantitative information is useful to:
Explore and understand experiences, motivations, needs, attitudes, beliefs, behaviour = HOW and WHY	Measure the incidence of an event, numbers, the degree of change across time or between groups = HOW MUCH, HOW MANY

Who your consumers are (demographics)

You may need to collect demographic information about the characteristics of the consumers that provide feedback. This can be important to understand whether your participants are representative of your broader target group or whether people respond to certain questions differently, depending on certain characteristics or experiences.

Example:

How often do you receive personal care services from Healthyville Council?

☐ Less than once a week ☐ Once a week ☐ Twice a week ☐ More than three times a week

Example:

Which country were you born in?

Consumer's knowledge

To test a consumer's knowledge, you need to ask a factual question (for which there is a right and wrong answer). Survey questions are usually most effective as they allow you to collect information in a consistent and structured way.

Example:

Which of the following, are things you can do to help prevent falls? (please tick all that apply)

- ☐ Stand up slowly after lying down and making sure I am steady before walking.
- ☐ Always wear slip on shoes or slippers inside my home.
- ☐ Regularly review my medications with my doctor or chemist and talk to them if I experience any side effects.
- ☐ Store heavy items above my shoulder height, so I don't have to bend down to pick them up.
- ☐ Exercise regularly and stay active.
- ☐ Keep my walking aids outside so that I don't trip over them around the house.
- ☐ Turn on my bedside lamp before getting up at night and keep my glasses within reach.

This question could be included in a survey that is given to participants of a falls prevention education session. If the same questionnaire was used at the beginning and end of the session, you could evaluate whether your clients understanding of falls risks and prevention strategies had changed.

While it's relevant to collect this information as part of the evaluation, consumer safety always comes first! Therefore, your priority is making sure that everyone walks away with the correct information. After everyone has completed the survey, you need to run through the correct answers with the group. It may also be useful to send participants home with a handout that reinforces the important safety information.

Example:

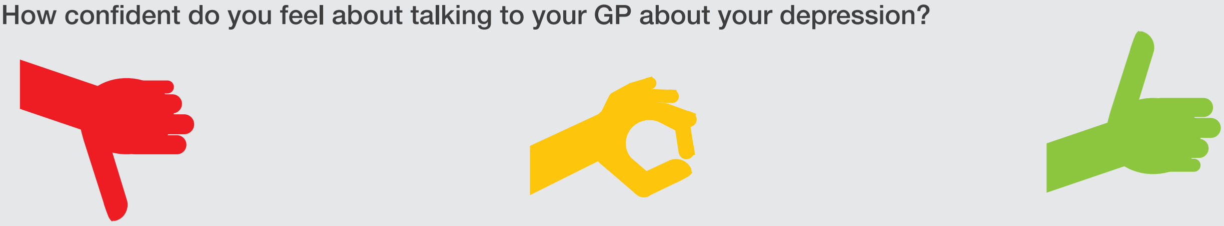
What are three things you can do to help prevent falls at home?

People's confidence/attitudes/perceptions

Consider the depth of information required. Using rating scales or open ended questions on a survey can be appropriate. If you need a richer understanding of why someone feels a certain way and you want to understand their response in greater depth, then a less structured interview, or focus group can be more effective.

Example:

How confident do you feel about talking to your GP about your depression?



Not at all confident				Very confident
1	2	3	4	5

People's Behaviour

This can include asking about people's actual behaviour (i.e. what they are currently doing or have done in the past) or their intended behaviour (e.g. what they plan to do in the future). Asking multiple choice questions can be a quick and easy way to collect information about actual or intended behaviours.

If you want to understand why people have or haven't changed their behaviour, or the factors that impact on their ability to make changes, then collecting qualitative information, via an interview or focus group would be more useful.

Example:

How often do you currently exercise?

- ☐ Less than once a week
- ☐ 1 – 3 times a week
- ☐ 4 – 5 times a week
- ☐ 6 or more times a week

This question asks about actual behaviour.

Example:

Since working with the *Linking You In* team, if you felt that you needed more support in the future, what would you do?

This question asks about intended behaviour change. You could only find out whether working with the *Linking You In* team had impacted on their actual behaviour, by collecting feedback at a later date.

People's experience/beliefs/rationale

While you can collect some information about people's experience and satisfaction via survey questions, the depth of information is very limited. To understand more about why people feel a certain way, how they experience a service or the motivation/thoughts behind their responses, more information is usually required. Collecting information via focus groups or interviews usually works best.

Example:

Our clients include people from a range of cultural and religious backgrounds. We understand that food plays an important part in many cultures.

Are the meal choices we provide appropriate to your culture?

- ☐ Always
- ☐ Most of the time
- ☐ Sometimes
- ☐ Occasionally
- ☐ Never

You could ask consumers a direct question about whether your meals are culturally appropriate within a survey.

Alternatively you could collect demographic information (such as country of birth, language spoken and religion) and then correlate that to questions that rate their satisfaction with meal choices.

This will give you some indication about whether your current menu is culturally appropriate. To understand more about the strengths and weaknesses of the current menu and how food could be better tailored to suit the needs of your clients, conducting interviews or a focus group with some CALD clients may be most relevant.

Additional information about the type of information that can be collected via surveys, focus groups and interviews is included in the following resources:

- ***'Developing Consumer Surveys'***.
- ***'Conducting Focus Groups'***.
- ***'Conducting In-depth interviews'***.

The ***'Facilitator's guide templates'*** and the ***'In-depth interview protocol'*** also include tools that prompt you to document the relevant timeframes and resources required.

References

ACSQHC (2024) *Indicators, measurement and reporting*. Australian Commission on Safety and Quality in Health Care (ACSQHC), Canberra

ACSQHC (2006) *Measurement for Improvement Toolkit*. Australian Commission on Safety and Quality in Health Care (ACSQHC), Canberra

Shah, A (2019) *Using data for improvement*. BMJ 364:l189

Victorian Quality Council (2008) *A Guide to using data for health care quality improvement*.

DH (2011) *How to use qualitative research evidence when making decisions about intervenions*. Department of Health (DH), Victoria

Protecting consumers' privacy and confidentiality

Many consumers are concerned about the way their information will be used and this can be a significant barrier to them feeling comfortable and confident to provide honest feedback.

Legislation, including the *Privacy Act 1988*, requires that consumer information is protected. While this is core practice for staff and supported by organisational policies and procedures, many consumers won't know this. Sometimes staff forget to provide consumers with information about the processes in place to protect their privacy or underestimate this as a potential participation barrier.

When designing how you will collect consumer feedback, consider how you will address the following requirements:

- You must always protect the privacy and confidentiality of consumer information, regardless of the purpose for which it is collected (including compliance with the *Privacy Act 1988*).
- You must gain consent from the consumer to collect and use their information. Consumer consent should be documented (by the consumer or by staff, as per your organisation's consent documentation procedures).
- You cannot use or disclose information collected for one purpose (e.g. to inform service delivery) for any other purpose (e.g. to evaluate your program) without the consumer's consent.
- Information about privacy and confidentiality should be provided to consumers as part of the recruitment process and then reinforced when they provide feedback (e.g. at the beginning of an interview or focus group and within the introduction of a survey).
- Written surveys and some compliment/complaint systems are the only data collection mechanisms that allow consumers to remain anonymous.
- Strategies to maintain consumer confidentiality should be documented, including how you will de-identify, store and destroy data.

References

For additional information about privacy, confidentiality and ethical considerations, refer to:

The *Office of the Australian Information Commission's* website includes relevant legislation, the Australian Privacy Principles, fact sheets and a range of practical resources about managing personal information.

Australian Government (1988) *Privacy Act 1988*.

OAIC (2018) *De-identification and the Privacy Act*. Office of the Australian Information Commission (OAIC), Commonwealth of Australia, Canberra

Australian Research Data Commons's resource hub includes a number of valuable resources about how to work with sensitive data. This includes information about managing sensitive information, identifiable data and Indigenous data.

NHMRC (2023) *National Statement on Ethical Conduct in Human Research*. National Health and Medical Research Council (NHMRC), Australian Government, Canberra

LaTrobe University (2024) *Data de-identification*. LaTrobe University, Bundoora.

Practical strategies to support consumer privacy and consent

There are times when it's useful and/or necessary to collect personal and/or identifying information as part of the feedback process. Consider how you can design your tools and approach to protect participants' privacy and confidentiality.

Process/Scenario	Recommendations/Strategies
When collecting feedback over the phone: • You need to document the consumer's name on a call sheet to keep track of who you are calling. • It's usually unnecessary, to record the person's name on their response sheet.	• Print and store the call sheets separately from your consent forms, completed survey tools and/or interview transcripts. • Once you have finished making calls, destroy, or de-identify the call sheet information you no longer require.
When developing written surveys: • Some consumers may want the opportunity to discuss their feedback or ask follow up questions. • You may find it helpful to have the option to follow up with individuals to discuss or clarify their responses.	• Always include staff contact details in the survey, so that consumers can contact you directly to discuss the survey. • Only collect a consumer's name if you intend on following them up in some way, otherwise its usually preferable to collect information anonymously (or at least give people a choice to remain anonymous). • Include a space for consumers to provide their contact details if they would like a member of staff to follow up with them (e.g. to provide additional information about the survey, answer questions or for the consumer to provide additional feedback). The consumer's survey responses can still be submitted anonymously if the prompt question is included on a separate piece of paper (or tear off section on your survey). Their personal information can then be returned and/or stored separated from their feedback. Similar strategies can also be adopted in online surveys, where personal details are stored in a separate spreadsheet / database.
When collecting feedback in a group	• Create ground rules at the beginning of a focus group that specifically discuss the expectation that information discussed in the group is confidential. • Hold the focus group in a private and quiet area. • Don't pressure people to discuss issues they're not comfortable talking about.
Reporting demographic and/or personal information	• Use pseudonyms, change personal details or exclude information that may identify a consumer from your data. • Think carefully about how you collate, analyse and report your data to ensure that people's identity remain anonymous (e.g. don't report unique characteristics).

What resources are available to support you?

Understanding the resources available to support your evaluation may be a key determinant that guides your approach. Consider a range of resources including:

- **Budget:** Consider the direct expenses (e.g. participant reimburses, taxis/travel, catering, postage) and the indirect costs for staff and consumers (e.g. opportunity costs).
- **Physical resources:** Consider the resources required to reach and engage consumers. This may include venues, equipment, availability of childcare etc.
- **Consumers:** Consider the time, skills, circumstances and/or experience of the consumers you need to engage with. Where possible, look for opportunistic ways to collect feedback to reduce the demands on your consumers. Think also about whether the consumers need any support or education to be empowered to provide feedback effectively.
- **Staff time, skills and expertise:** Consider staff's availability to collect, analyse and report consumer feedback (as described previously). It's important that this time is factored into your planning and strategies are put in place to identify and manage any potential impact on service delivery. You also need to factor in staff's skills and confidence in collecting and analysing feedback and sharing the results.

  Consider which staff are most appropriate to collect feedback.

Example:

You want to conduct surveys to understand whether clients feel that their nurse listened to them and supported them to make decisions about their care.

It wouldn't be appropriate for the nurse to complete the survey with their own clients (as this is likely tobias the results). You need to consider whether another staff member is available to complete the surveys, and whether they have the relevant skills and knowledge about the program. If this isn't possible, creating a written survey (paper based or online) may be more appropriate.

Making the most of the feedback you collect

Feedback is only useful if it is used to make improvements.

It's important to consider how you will report, share and use your findings. As part of your initial planning, prepare a communication strategy and let participants know how you will use their feedback (as part of the recruitment process). Your communication strategy should describe:

- **Who you need to communicate your findings with** (e.g. consumers, staff, funding bodies, other local service providers or agencies that deliver similar services).
- **How you will communicate your findings**.
- **What information you will share**.
- **When you will provide feedback**.

Involve your stakeholders to find out the most appropriate ways to share your findings. Information can be presented in a range of different formats, so be creative!

- Face to face training/workshops.
- Presentations at meetings or local events.
- Conferences.
- Individual direct feedback/updates.
- Media reports.
- Journal articles.
- Posters/charts.
- Newsletter articles.
- Vignettes.
- Written reports.
- Brochures.
- Websites.

Target the messages to your audience.
Different groups need different information!!!

Why do we need to share results with consumers?

Providing participants with feedback about the way their information has been used is very important. It reinforces that you value their input, have listened to their feedback and used it effectively. When people don't hear about the outcomes, they often assume that nothing happened. Consider whether it's appropriate to acknowledge your participants publically and whether there are opportunities for participants to get involved in sharing your findings (e.g. by sharing their story, presenting findings).

It's also valuable to share information with other consumers. This raises awareness of key issues, actions or changes, builds trust and confidence in your organisation's engagement process and increases the likelihood that people will provide feedback in the future.

When reporting your findings:

- Let people know about what you learned, what changes are being made and what difference those changes are likely to make.
- If there is feedback that you haven't/can't action, explain why and describe how the information will be used (e.g. reporting feedback to relevant people, using feedback to raise awareness or advocate for broader reforms).
- Respond to any questions that have been raised and inform people about other opportunities to provide feedback.
- Acknowledge the limitations of your approach and how these may impact the findings.

References

BetterEvaluation (2022) *Develop Reporting Media*.

O'Neill, G. (2017) *A guide: Integrating communication in evaluation*. Owl RE: Wise Research & evaluation, Geneva

The Health Foundation (2015) *Communication in health care improvement – a toolkit*. The Health Foundation, UK.

EvalCommunity (2023) *How to write evaluation reports: Purpose, Strusture, Content, Challenges, Tips and Examples*. Evaluation Community

Pascale, K (2020) *How to create great case studies*. Kate Pascale and Associates in collaboration with SSD Connect, Melbourne Vic.

Worksheet: Designing your approach

This template can be useful to document key information and provide evidence of the rationale for your approach.

Designing your approach: Worksheet	
What is the purpose of collecting feedback?	
Who does information need to be collected from?	
What are the needs of the consumers who will provide feedback? *Consider the diversity within the group and what is appropriate and meaningful given their age, culture, beliefs, abilities, function and circumstances.*	
What steps need to be taken to ensure that you collect information in an appropriate and respectful way?	
How many consumers are there in the target group?	
How many consumers do you need feedback from?	
What are the timeframes?	• Planning. • Data Collection. • Analysis. • Reporting.
What information is required?	
What resources are available to support you to collect feedback?	

Additional resources

Consumer feedback / evaluation methodology

Better Evaluation host a vast *resource library* which includes a number of useful tools and resources to guide you through ease phase of your evaluation.

ACSQHC (2023) *Patient experience measurement in primary health care* Australian Commission on Safety and Quality in Healthcare (ACQSHC), Canberra.

ACSQHC (2018) *Review of key attributes of high-performing person-centred healthcare organisations*. Australian Commission on Safety and Quality in Healthcare (ACQSHC), Canberra.

The Health Foundation (2013) *Measuring patient experience (No. 18)* The Health Foundation, London.

Radmore, S.J., Eljiz, K. & Greenfield, D. (2020) *Patient feedback: Listening and responding to patient voices*. Patient experience Journal Volume 7 (1) pp 13-19.

NIHR (2019) *Improving Care by Using Patient Feedback*. Health and Social Care Service Research, National Institute for Health Research (NIHR) Dissemination Centre, Southampton, UK.

Care Opinion Australia host a *library of research* about feedback about healthcare. It includes a range of articles about consumer feedback strategies and key learnings.

The Community Tool Box is a service of the Center for Community Health and Development at the University of Kansas. The *Community ToolBox* is available online and contains a range of useful information about designing, implementing and evaluating healthcare and community empowerment programs.

Our Community (2017) *Measuring What Matters: An introduction to project evaluation for not-for-profits.* Our Community Pty. Ltd. North Melbourne, VIC.

AHRQ (2024) *Get Patient Feedback*, Tool 17 of the Health Literacy Universal Precautions Toolkit (3rd Edition). Agency for Healthcare Research and Quality (AHRQ), Rockville MD.

Chisholm, A & Sheldon, H. (2011) *Service User Feedback Tools: An evidence review and Delphi consultation for the Health Professions Council.* Picker Institute Europe.

Working with diverse client groups

The following resources include practical strategies and information that can assist you to design consumer feedback strategies and tools that are tailored to (or considerate of) the needs of diverse clients.

HIC (2022) *Guide for inclusive community consultations*. Heath Issues Centre (HIC), Melbourne.

RDI Network host a range of resources in their learning hub about *Inclusive and Accessible research*. It includes a range of practical toolks, guides and advice to support agencies promote inclusion across a range of different engagement strategies.

Capire (2012) *Inclusive Community Engagement Toolkit: A Practical Guide*. Capire Consulting Group, Collingwood VIC.

Capire (2023) *Learning Lab: Intersectionality and Engagement* (Webinar), Capire Consulting Group, Collingwood VIC.

People from Culturally and Linguistically Diverse (CALD) backgrounds

The ***Centre for Cultural Diversity in Ageing*** (CCDA) have published a number of resources that provide information about culturally inclusive feedback. These include:

- *Practice guide: Culturally inclusive feedback* (2020)
- *Inclusive Consumer Feedback* (webinar) (2021)
- *Consumer Feedback Forms* (68 languages) (2023)
- *Practice guide: Data and Demographics* (2022)

The ***Centre for Culture, Ethnicity and Health*** provides specialist information, training and support to health and community services about cultural diversity and wellbeing. Their website includes a number of excellent resources about engaging CALD consumers. . Of particular interest may be:

- *Consumer Participation and Culturally and Linguistically Diverse Communities*.
- *Cultural competence in planning, monitoring & evaluation*.

Aboriginal and Torres Strait Islander people

NHMRC (2018) *Ethical conduct in research with Aboriginal and Torres Strait Islander Peoples and communities*. National Health and Medical Research Council (NHMRC), Commonwealth of Australia, Canberra.

Hunt, J (2013) *Engaging with Indigenous Australia—exploring the conditions for effective relationships with Aboriginal and Torres Strait Islander communities.* Issue paper no 5. produced for the Closing the Gap Clearinghouse, Australian Institute of Health and Welfare (AIHW), Australian Institute of Family Studies (AIFS), Australian Government, Canberra.

Older people

Better Together (2016) *A Practical Guide to Effective Engagement with Older People*. South Australian Office for the Ageing, Better Together in the Department of Premier and Cabinet, South Australia.

Ratcliffe J, Khadka J, Crocker M, Lay K, Caughey G, Cleland J, Gordon S, Westbrook J. (2021) *Measurement tools for assessing quality of life, consumer satisfaction and consumer experience across residential and in-home aged care: Summary Report*. Caring Futures Institute, Flinders University.

COTA (2016) *The Voice of consumers in Home Care: A Practical Guide*. Home Care Today, Council of The Ageing (COTA).

People living with dementia

Dementia Australia are developing a *Consumer Engagement strategy: A stronger voice together*. They have put together a range of resources about how people living with dementia can be included effectively. Of particular interest may be:

- *Half the Story: A guide to meaningful consultation with people living with dementia, families and carers* (2022).

Alzheimer Society (2015) *Meaningful Engagement of People with Dementia: A resource guide.* Alzheimer Society, Canada.

The **Dementia Engagement and Empowerment Program (DEEP)** is the UK's network for dementia voices. Their *resource library* includes a number of useful resources and guides to assist agencies engage people living with dementia. Of particular interest may be:

- *The Dementia Engagement and Empowerment Project: DEEP Guide: Collecting the views of people with dementia* (2013).
- *Valuing the contributions of people with dementia* (2023).

SDWG (2014) *Core principles for involving people with dementia in research*. The Scottish Dementia Working Group (SDWG) Research Sub-group, The University of Edinburgh.

People who identify as LGBTIQ+

LGBTIQ+ Health Australia (2021) *Best practice in co-design*.

Rainbow Health Australia supports LGBTIQ+ health and wellbeing through a range of initiatives, including service accreditation through the Rainbow Tick. The Rainbow Tick quality framework includes a standard that specifically relates to 'Consumer Participation (standard 3). The program's resource library provides guidance and evidence requirements to support agencies understand how LGBTI people should be effectively engaged in quality improvement.

ABS (2021) *The Standard for Sex, Gender, Variation of Sex Characteristics and Sexual Orientation Variables 2020*. Australian Bureau of Statistics (ABS), Canberra.

LGBTIQ+ Health Australia (2021) *Factsheet: New Australian Bureau of Statistics 2020 Standard*.

TransHub (2021) *Researchers* TransHub, ACON NSW.

WSU (2021) *Guidance: Gender and Sexuality Inclusive Language for survey questions*. Western Sydney University (WSU), Research Services: Ethics and Integrity.

Sell, R. (2015) *LGBTData.com*

National Resource Center on LGBT Aging (2023) *Inclusive Questions for Older Adults: A practical guide to collecting data on Sexual Orientation and Gender Identity.* Sage USA.

Children and young people

Goldsworthy, K. (2023) *Involving children in evaluation: What should you know?* Australian Institute of Family Studies, Australian Government.

Participation Works (2008) *Involving Children and Young People in Evaluation*.

Public Profit (2012) *Creative ways to solicit youth input: A hands-on guide for youth practitioners.*

NSW ACYP (2015) *Understanding and supporting children and young people's participation*. NSW Advocate for Children and Young People (ACYP), NSW Government.

YoungMinds have created a range of publications to support organisations understand how to effectively engage young people and their families in quality improvement. Their participation toolkits are available online. Of particular interest may be:

- *Evaluating Participation: A guide for professionals (2020)*
- *Digital engagement in participation (2021)*
- *Evolving by Involving: Involving young people and their parents / carer in mental health care (2020)*
- *Rewarding participation (2020)*

People who are homeless or living in unstable housing

HomeGround Services and Rural Housing Network Ltd. (2008) *Consumer Participation Resource Kit for housing and homelessness assistance services.*

ShelterTAS (2013) *Consumer Engagement Strategy: Fostering the active participation of people who are, or have been homeless.* Shelter Tasmania.

ShelterWA (2021) *Hear Of My Experience (Home): Lived experience Engagement Framework Housing and Homelessness Service Providers*, Developed by Particia Owen and Adriana Sowah for Shelter WA.

Mission Australia (2020) *Learning from Lived Experience: A Framework for Client Participation.* Mission Australia.

Alcohol and Other Drug users

Clarke, M & Brindle, R (2020) *Straight from the source: A practical guide to consumer participation in the Victorian Alcohol and Other Drug sector Second Edition*.

Insight (2016) *AOD Client Engagement toolkit*. Insight Centre for alcohol and other drug training and workforce development, Mental Health Alcohol and Other Drug Statewide Clinical Network, Queensland Government.

People with disabilities

DSS (2023) *Good Practice Guidelines for Engaging with People with Disability*. Department of Social Services (DSS), Commonwealth of Australia, Canberra.

RDI Network (2020) *Research for All: Making Research Inclusive of People with Disabilities*. Research for Development Impact Network.

Inclusive SA (2019) *Engagement and consultation with people living with disability*. Inclusive SA, Government of South Australia.

Inclusion Australia have published a range of resources to support organisations design and deliver services that are inclusive of people with an intellectual disability. These include specific resources about *inclusive consultations*.

People experiencing mental illness

The **National Mental Health Consumer& Carer Forum** host a vast *Lived Experience Leadership digital library*. This includes resource collections that focus on *Engagement and Participation* and *Co-design and Co-production*.

NHMC (2018) *Consumer and care engagement: a practical guide*. National Mental Health Commission (NHMC), Australian Government.

DHHS (2021) *Mental health lived experience engagement framework*. Victorian Department of Health and Human Services, State of Victoria.

VMIAC (2023) *Lived experience research toolkit*. Victorian Mental Illness Awareness Council (VMIAC), Victoria.