







Housing Needs Assessment & Effective Community Engagement

NAIHC Virtual Training
 March 20, 2023
 11:00 AM – 3:00 PM ET

1



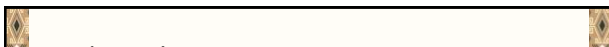
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2



Welcome!

- Thank you for being here!
- Unmute yourself or raise your hand to speak.
- We want this to be as interactive as possible.
 - We will have exercises, interactive breakout rooms with Jamboard and a chance for discussion.
- Chat questions/comments into the chat box at any time.

3

TODAY'S AGENDA

What is a housing needs assessment and how is a needs assessment structured?

Stakeholders: Who needs to be involved in the process and how to engage them

Purposes and Goals:

- Putting together a timeline of the Tribe's history to determine where the community has come from and where it is going
- How to determine if a housing needs assessment is necessary, and what does it seek to achieve (the "why")

Data Needs: What specific information do the different stakeholders need?

Structure of a Needs Assessment: What questions must be answered by stakeholders to design the project?

Determining project structure and defining the questions to be asked?

Public Relations: How do you plan to inform the community about the project and why it is taking place? What communication channels will you use?

Timing and Duration: When would be appropriate to conduct the project and how long will it last?

Budget: What will the project cost and how will you pay for this?


4

Goals for Session

- Acknowledge Diversity of Goals and Purposes
- Recognize and Maximize Value of Project for Sponsor and Tribe
- Capacity-Building and Promotion of Data Sovereignty
- Provide Initial Roadmap Outlining Data Collection

5

Introduction: Beaux Simone Consulting



- Over 40 years of collective experience working with Tribes, rural and urban communities
- Experience in direct homeless services and affordable housing
- TA providers for HUD
- Under contract with NAIHC to provide TA to tribes

6



Big Water Consulting was created in Seattle, Washington over 10 years ago for the purpose of promoting tribal data sovereignty; building the capacity of underserved, culturally distinct, and often misrepresented communities to collect, analyze and take action based on their own data; and enabling communities to challenge data that inaccurately describes them.

Data is a vital piece of a community's story and BWC believes that communities deserve to tell their own story.



Managing Director:
Kevin Klingbeil

Research Coordinator:
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Data Analyst:
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Chloe Adler
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7

Introductions / Expectations / Hopes


HELLO

My name is

PLEASE TYPE INTO THE CHAT BOX:

1. Your name, role, and your Tribe or organization?
2. What are you hoping to gain from this 2-day training?

8



Indian Lands
Due to map scale constraints, land areas smaller than 25,000 acres are omitted.

9

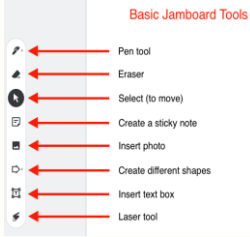
Session Materials

- Exercise Sheet
- Data Collection Project Considerations

10

What is Jamboard?

- Jamboard is an interactive and collaborative tool developed by Google.
- Think of Jamboard as a digital whiteboard where participants can interact with one another during a session.
- You can participate by writing (using your mouse) or typing into a sticky note.
- During the breakout session, your host will share a link for your group to work on Jamboard together.



The image shows a vertical toolbar for Jamboard with the title "Basic Jamboard Tools" in red. The tools are: Pen tool (a blue pen nib), Eraser (a grey eraser), Select (to move) (a black arrow), Create a sticky note (a yellow note icon), Insert photo (a camera icon), Create different shapes (a square icon), Insert text box (a text box icon), and Laser tool (a red laser pointer).

11

Housing Needs Assessment Background and Steps

12

What is a Housing Needs Assessment?

A housing needs assessment should, at a minimum, bring together:

- Different data sets (employment/economic trends, demographic, housing inventory)
- Policies, history, and other relevant information
- Input from various stakeholders and members of the community, usually using surveys, focus groups, interviews, community meetings and other methods



This information is used to determine current and future housing needs and gaps, identify how to best address specific needs, and support data-driven planning processes.

13

Determining Whether You Need One

- Evaluate Existing Data and Plans
- Evaluate current housing stock and the need for various housing opportunities
 - Shelter
 - Domestic Violence Shelter
 - Foster Care
 - Elder Housing
 - Supportive Housing/THUD VASH
 - Affordable Rental Housing
 - Home Ownership



14

Scope and Subject Matter of Assessment (i.e., Is just housing enough?)



- Involving other programs can help:
 - Build network of resources and PR for project
 - Ensure other programs can use data for their programmatic needs
 - Enable other programs to apply for specific grants or inform programs with just one or two additional survey questions (e.g., AODA treatment center)



15

Stakeholders

- Consider who needs to be involved in the process as stakeholders:
 - Tribal Programs (e.g., Housing, Planning, IT, Health, Education, etc.)
 - Tribal Leadership (buy-in and support)
 - Members of Community

16

Initial Planning Session and Stakeholders

- Invite all stakeholders to the table (virtual meeting or, preferably, in-person)
- Orient consultants/contractor (if hired) to the Tribe, its communities and the neighboring area
- Determine the purpose and direction of the project:
 - Types of data to be collected and methodology for collection
 - Information to be reported
 - Deadlines for project activities

17

Tribal and Program History: Where You are Coming From and Where You are Going?

Frame discussion:

- Historical context for Tribe and relevant communities
- Past achievements and struggles
- Defining people, features and activities of the Tribe or communities
- Current initiatives
- Future plans and hopes/dreams



18

Identifying Project Purposes (the "Why")

- Tribal Census
- IHBG Formula "Census Challenge"
- Integrated Economic Development Strategy
- Housing Market Analysis
- Informing Tribal Council Planning Efforts
- Program Expansion/Contraction
- Feasibility Studies for New Programs or Facilities
- Guiding New Housing Development
- Identify Homeless and Doubled Up Community Members
- Prioritization of Supportive Housing Projects (e.g., veterans and elders)
- Satisfy Head Start, SAMHSA, FEMA or other Program/Grant Requirements re: Needs Assessment

19

Determining What Data/Information You Need

- Existing Data: Acknowledge, Identify and Evaluate
 - Examples: existing surveys/needs assessments; tribal membership on/off reservation; number of TDHE-managed units; units conveyed; plans for future development; housing stock; number of units; home sales and valuation data; zoning and codes; economic data (employment, prevailing wages, etc.)
- Review Existing Plans to Determine Already-Identified Needs, Plans and Assumptions
- Assess Relevance, Accuracy and Currency of Available Data for Target Population and Relevant Area
- Explore Gaps in Available Quality Data to Determine Scope and Specific Content of New Data Collection

20

Case Study #1

White Mountain Apache Housing Needs Assessment (Arizona)

- Develop forward-looking planning and program management
- Identify and measure the needs of communities throughout the Fort Apache Indian Reservation
- Housing needs assessment included a household survey that collected data from 654 homes on the reservation and had an overall response rate of 97.2%
- Conducted a successful "Census Challenge" which allowed the Tribe to replace Census data with data that they collected, resulting in substantially increased funding for the Housing Authority
- Identified and mapped use of (potentially dangerous) sheds by households to alleviate overcrowding





21

Case Study #2

Muckleshoot Community Needs Assessment (Washington)

- This in-progress needs assessment (partially funded by Enterprise Community Partners) on a reservation between Tacoma and Seattle includes an on- and off-reservation component
- One specific purpose of the project is to provide targeted data regarding the service-related needs of members living on- and off-res to support the development of a permanent supportive housing (PSH) project funded by Low Income Housing Tax Credits
- The tribal housing authority wants to understand how tribal members and residents of the reservation are utilizing tribal programs, and what kinds of programs they'd like to see developed, improved or expanded. For example, the Tribe offers a new medical center and is considering an electric vehicle share program
- In an area where housing costs are notoriously high, the Tribe also wants to know how it can serve its members experiencing homelessness—who may be living away from the reservation due to their housing status—and facilitate their return to the reservation if they desire to do so





22

Exercise #1 – Jamboard Breakout

Breakout room:

- Brainstorm at least three purposes for data collection projects. Why might a Tribe or your program want to collect and manage data?
- Which individuals, organizations, or programs can help you achieve your mutually agreed upon goals?
- What conflicts or challenges may make it difficult to achieve these goals?
- Report out ideas



23

Project Design

24

Quantitative vs. Qualitative Data

	Quantitative	Qualitative
Definition	Numbers and statistics	Words and descriptions
Can it be counted?	Yes	No
Data Type	Numbers, percentages, ratios	Words, phrases, descriptions
Examples	<ul style="list-style-type: none"> Number of people who attended a meeting Percentage of people who answered a survey Average score on a test 	<ul style="list-style-type: none"> People's opinions on a new product People's experiences with a service People's feelings about a situation

25

Data Collection Methods

Prior to New Data Collection:

- Review and Evaluation of Existing Data (programmatic, census data, economic data, etc.)
 - Useful for comparison with newly collected data and additional context
 - Potentially reduce the burden or scope of current data collection efforts


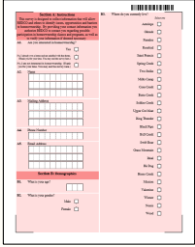
New Data Collection Methods:

- Survey Forms and Questionnaires
 - Statistically representative surveys, intercept surveys, censuses, etc.
- Focus Groups
 - Conducted with specific subpopulations of the community
- Key Informant Interviews
 - Conducted with knowledgeable individuals who can inform survey design and help interpret survey results
- Community Meetings
 - Helpful for PR purposes and to get broad input from community members

26

Surveys

- Online vs. paper forms vs. in-person tablet data collection
- Potential for survey of off-reservation members or in broader service areas

27

Focus Groups

- **Roles for Facilitators:**
 - Moderator keeps discussion focused and is someone who people are comfortable opening up to
 - Separate note-taker to take notes
 - Record the discussion if possible
- **Specific subpopulations within the community**
 - e.g., renters, future homeowners, elders, those experiencing homelessness or in need of specific services
- **Ideally 5-10 individuals**
 - Larger groups discourage depth of conversation, and small groups may provide less information
- **Fewer than ten open-ended questions and script that helps participants answer "why" questions**
 - e.g., "why do people not want to live in the new housing development and what would they prefer?"

28


Key Informant Interviews

- **In-depth interviews with people familiar with specific topics, communities, or programs**
 - Department/program leaders, community leaders, residents
- **Multiple interviews with people with wide range of experiences and perspectives on core issues**
- **Opportunities to learn about past efforts and what has/has not been effective**

29

Community Meetings


- **Publicize needs assessment and get community buy-in/build rapport**
- **Hear public comments and concerns**
- **Determine what information community wants to share (and may not be on the survey)**
- **Participatory activities (e.g., resource mapping, visioning exercises)**
- **Audience polling**



30

Additional Online Tools

- Participatory mapping
- Public comment forms
- Quick polls
- Text message banking/polling
- Text alerts



Example map results at bigwatersconsulting.net/participatory-mapping

31

Survey Design Considerations

32

Survey Design Considerations



Building Off of the 'Why'

- Who
- Where
- What
- How
- When

33

Target Population (Who)



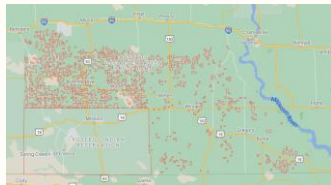
Which group(s) of people do you want to gather information about? (Target Population)

- All Households on Reservation/in Service Area?
- All Tribal Members (e.g., both on- and off-reservation)?
- Primary Market Area?

34

Survey Area and Survey Frame

- Who will be surveyed and where do they live?
- Is there a map of housing units or list of addresses? (survey frame)
- How many non-AI/AN households are in the survey frame?
- Consider checkerboarding and other issues when determining survey area

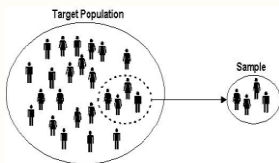


Example: Rosebud Indian Reservation and Off-Reservation Trust Land

35


Sample Size

- How large must your pool of respondents be to understand the needs of the relevant population and meet project requirements?



36

Duration and Timing



What time of year will the survey take place? (Timing)

How long should the survey be available? (Duration)

Considerations:

- Summer – difficult time to contact households
- Winter – depends on local weather conditions
- Consider community events/activities that may promote or distract from survey response

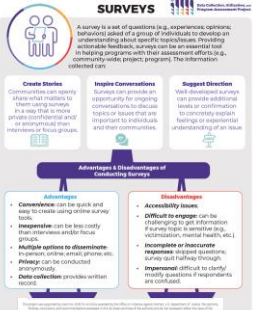
37

Sample Project Timeline

- May – Issue RFP and Select Contractor (if necessary)
- June – Select Contractor and Finalize Contract (if necessary) and Schedule Planning/Design Session
- July – Initial Project Design Session, Finalize Survey Instrument & Plan PR
- August – Conduct Interviews, Focus Groups, and Other Research
- Early September – Launch Online Survey
- Late September to November – Field Survey (Door Knocking)
- December – Data Analysis
- December & January – Reporting (Stakeholders, Community Meeting)

38

Survey Tips



SURVEYS

A survey is a set of questions (e.g., experiences, opinions, behaviors) asked of a group of individuals to develop an understanding about specific topics/issues. Providing immediate feedback allows for the assessment and refining programs with their assessment efforts (e.g., community-wide project program). The information collected can:

- Create Surveys**
 - Communicate an opportunity that matters to them using surveys.
 - Be a tool to make plans and decisions and/or to assess needs, opinions, or focus groups.
- Engage Conversations**
 - Surveys can provide an opportunity for ongoing conversations to discuss topics or issues that are important to individuals and their communities.
- Suggest Directions**
 - Well-designed surveys can provide additional levels of information to generate insights to community needs, feelings or experiential understanding of an issue.

Advantages & Disadvantages of Conducting Surveys

Advantages	Disadvantages
<ul style="list-style-type: none"> • Convenience can be quick and easy to create using online survey tools. • Impersonal can be less costly than other ways to gather data. • Multiple options to disseminate - Surveys can be shared via email, phone, etc. • Privacy can be conducted anonymously. • Data collection provides written records. 	<ul style="list-style-type: none"> • Accessibility issues - Difficult to engage can be challenging to get responses if survey topic is sensitive (e.g., addiction, mental health, etc.). • Incomplete or inaccurate responses require someone survey with having through. • Impersonal difficult to clarify mostly questions if respondents are confused.

39

Anticipated Challenges or Obstacles

- Challenges to keep in mind and potential ways to address them:
 - Limited Budget
 - Working with various funding sources
 - Low Response Rate/Lack of Community Buy-in
 - PR and Survey Incentives
 - Availability of Field Staff
 - Competitive wages, bonus/incentive structures, adjust project timing
 - COVID-19
 - Vaccines and PPE
 - Poor Weather
 - Adjust timing of survey, build in buffer, field staff check-ins with manager, work in pairs
 - Respondent and Field Staff Safety
 - Two-day training, case assignments, working in pairs, record issues or concerns, etc.
 - Data Integrity and Security
 - Form validation, issue logs, secure servers, confidentiality

40

Case Study #3

Red Cliff Chippewa Housing Authority Housing Needs Assessment (Wisconsin)



- Data collection from December 2020 to February 2021
- Housing needs assessment for planning purposes and successful IHBG formula "Census Challenge"
- Households were asked to complete the survey electronically to avoid person-to-person contact due to pandemic
 - Helped reduce cost of data collection
 - Paper survey option with no-contact drop-offs
 - Minimal in-person (masked) contact

41

Break for Lunch – Back in 1 hour

42

Survey Content

- Survey Committee
- List of Sample Topics (drives stakeholder participation)
 - Demographics
 - Specific Housing Needs
 - Income, Debt, and Expenses
 - Employment
 - Health or Disability
 - Economic Development



43

Content Considerations


- Questions that will directly drive program planning, funding or other action (i.e., the usefulness test)
- Length (time and number of questions) and scope/subject matter of survey
- Upcoming grant or planning needs and deadlines
- Current and future programmatic needs (e.g., feasibility assessment)
- Question language is clear and culturally appropriate
- Answer choices are fully inclusive and appropriate for the survey area
- Consider adding narrative/open-ended questions to allow respondent to share more information (though they add to survey length)
- Address positive elements (e.g., likes, interests and opportunities) as well as needs

44

Sample Questions

- The Minnesota Vikings' quarterback, Kirk Cousins had impressive stats in the 2020 season. He went 4,265 yards with 35 touchdowns and had a passer rating of 105.0. Meanwhile, the Green Bay Packers' quarterback, Aaron Rodgers, threw multiple interceptions. Which team is better?

a) Vikings
b) Packers




45

Sample Questions

How long does it take to drive to New York?

- a) An Hour
- b) 10 minutes
- c) Twelve
- d) Too many





https://en.wikipedia.org/wiki/Statue_of_Liberty

46

Sample Questions

Do you like Yellowstone National Park and Walt Disney World?

- a) Yes
- b) No

https://www.disney.com/en/parcs/walt-disney-world/parcs/Disney-Castle

https://en.wikipedia.org/wiki/List_of_hot_springs_in_Yellowstone_National_Park

47

Exercise #2 – Jamboard Breakout

Keeping in mind who you are talking to, and the goals of the Needs Assessment:


- Brainstorm a few relevant survey questions for each example survey topic with your breakout group that you might ask of survey respondents.
- We will come together, and you will share example survey questions with the larger group.

Example Survey Topics:
Demographics; Housing; Income/Debt/Expenses; Employment; Health/Disability; Economic Development; Transportation; Education/Childcare; Miscellaneous

48

Equipment and Supplies

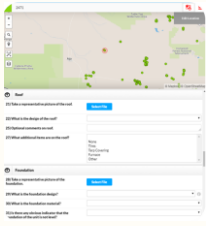
- Tablets
 - Cases, car chargers and backup battery
- Vests and ID Badges
- Door Hangers
- Markers, Notebooks, etc.
- Flyers, Posters, PR Materials
- Printed Surveys
- Postage



49

Software

- Many options for tablet-based data collection
- Ensure the software you use:
 - Has offline data collection and mapping capabilities if necessary
 - Has a diversity of supported survey question formats/options if necessary (e.g., taking pictures, rank choices, skip logic).
 - Is user-friendly for ease of data collection and analysis



50

Community Engagement and PR

51

PR Partners and PR Committee

PR Committee should consider all available channels (social media, web pages, school, radio, newsletter, etc.) to promote awareness and participation



52

Direct Community Engagement

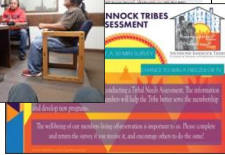


- Community Meetings
- Request Word of Mouth Support or "Project Ambassadors"
- Participation in Local Meetings (e.g., elders' lunches)

53

PR, Education and Outreach

What methods and materials will work for your community?



54

Incentives and Raffle/Drawing Prizes

- Gift baskets
- Gift cards
- Raffle drawings
- Contributions from Tribal Enterprises



55

Case Study #4

Flathead Indian Reservation Housing Needs Assessment (Montana)

- Salish & Kootenai Housing Authority initiated this project (partially funded by the Montana Healthcare Foundation and HUD T&TA) to quantify the ongoing crisis of housing and homelessness on the Reservation.
- Over 400 Tribal and non-tribal households responded to the survey, providing data on development of housing and community programs.
- A separate homelessness survey targeting doubled-up individuals and families enabled the tribe to quantify the issue and gather qualitative information that will help the Homelessness Coalition to better serve homeless community members
- Project resulted in the creation of a Reservation-wide housing coalition that includes SKHA, the county and non-tribal communities within the reservation and is dedicated to addressing housing development and homelessness needs.



56

Exercise #3

- What methods will you use to educate tribal leaders, tribal members, and respondents about the survey?
- What incentives would most effectively drive participation?

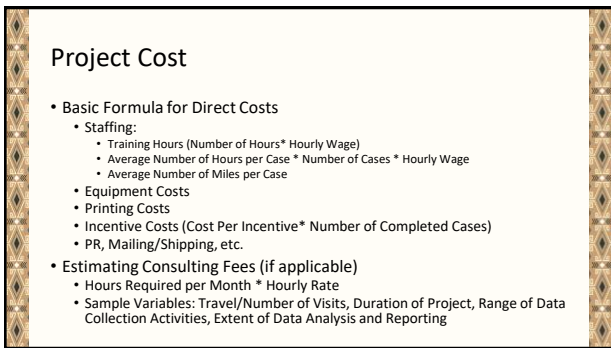


57



Project Cost, Funding and Procurement

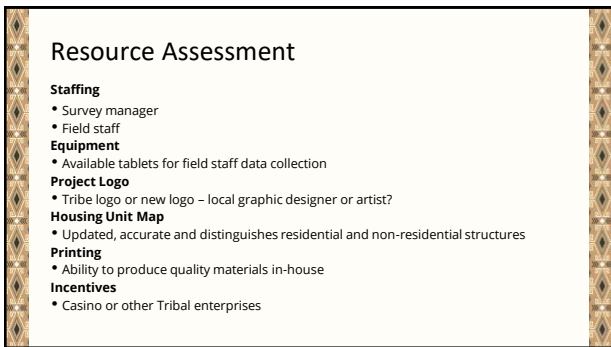
58



Project Cost

- Basic Formula for Direct Costs
 - Staffing:
 - Training Hours (Number of Hours* Hourly Wage)
 - Average Number of Hours per Case * Number of Cases * Hourly Wage
 - Average Number of Miles per Case
 - Equipment Costs
 - Printing Costs
 - Incentive Costs (Cost Per Incentive* Number of Completed Cases)
 - PR, Mailing/Shipping, etc.
- Estimating Consulting Fees (if applicable)
 - Hours Required per Month * Hourly Rate
 - Sample Variables: Travel/Number of Visits, Duration of Project, Range of Data Collection Activities, Extent of Data Analysis and Reporting

59



Resource Assessment

- Staffing**
 - Survey manager
 - Field staff
- Equipment**
 - Available tablets for field staff data collection
- Project Logo**
 - Tribe logo or new logo - local graphic designer or artist?
- Housing Unit Map**
 - Updated, accurate and distinguishes residential and non-residential structures
- Printing**
 - Ability to produce quality materials in-house
- Incentives**
 - Casino or other Tribal enterprises

60

Funding

Grants

- Federal Agencies (e.g., Enterprise Community Partners' administration of HUD Section 4 Capacity Building Grant)
- State and Local Agencies (e.g., South Dakota Housing Development Authority/South Dakota Native Homeownership Coalition Housing Needs Studies)
- Philanthropic (e.g., local, regional and national foundations focused on housing, health and community and economic development--Montana Healthcare Foundation)

[Grants are not limited to just the field of housing; other examples of grants that support needs assessments include, but are not limited to SAMHSA, USDA, EDA and FEMA]

Program Funds – Including IHBG funding

Tribal Funds

61

Case Study #5

Lac Courte Oreilles Community Assessment


- Included a household survey involving a random sample of 945 housing units on the reservation as well as a paper survey mailed to off-reservation members living in Sawyer County, WI (service area)
- Partially funded by Enterprise Community Partners in partnership with LCO Housing Authority and the Tribe
- Data was subsequently used in Strategic Planning Sessions involving tribal leadership (to coordinate various housing-related activities)



62

Case Study #6

Nch'i Wana Housing Community Needs Assessment (Washington-Oregon)



- Nch'i Wana Housing is an inter-tribal housing authority serving members of the four Columbia River Tribes and other Native people living in the Columbia River Gorge area of Oregon and Washington
- Community members and their relatives lost their homes, villages, and ancestral fishing sites when Celilo Falls was dammed in 1957, a choice that has profound impacts on their living conditions to this day
- Many Native residents of the area now live in mobile homes, cars, and boats at treaty fishing sites with minimal facilities
- This needs assessment project (funded by Minnesota Housing Partnership) surveyed Native residents of the sites and adjacent communities to understand their most pressing needs, priorities, and obstacles to receiving needed services, with the goal of improving living conditions and making the river a vibrant and flourishing place to live
- Nch'i Wana developed a partnership with several dozen Native and non-Native service providers in the Gorge area (Gorge Native American Coalition, or GNAC) to more comprehensively serve Native residents of the sites and the adjacent communities

63

Exercise #4: Estimating Costs

- \$ _____ Labor Cost (_____ sample size/# of cases x _____ hours/survey x _____ hourly wage)
- \$ _____ Mileage Cost (sample size x _____ miles per survey x _____ \$0.625/mile)
- \$ _____ Public Relations (generally \$1,000-\$2,000)
- \$ _____ Incentives (generally \$10-\$20/incentive x _____ # of completed surveys)
- \$ _____ Printing and mailing (printing and mailing costs _____ x _____ # of surveys)
- \$ _____ Data Collection Devices and Software (\$250/device x _____ # of field staff plus \$38/month x _____ # of devices for data collection software)
- \$ _____ Contractor Fees (e.g., 70 hrs/month x _____ # of months x _____ \$130/hr)

Total Cost Estimate \$ _____

64

Procurement

Review Policies	Review Procurement Policies with Procurement Officer if Available and Required Based on Policy, Funding Source and/or Contract Amount
Advertise	Consider Places to Advertise RFP—Where Contractors Look for RFPs • (e.g., Indian Country Today, NAIHC, Regional Housing Associations)
Timeline	Factor Procurement Timeline into Overall Project Timeline

65

Drafting and Issuing RFP/RFQ

- Consider planning session with stakeholders to develop framework and components of RFP
- Examples of Key Elements:
 - Tribal Background and Geography
 - Sponsor
 - Project Purposes/Goals and Subject Matter/Issues to be Addressed
 - Internal or External Data Requirements (e.g., representative sample, response rate)
 - Anticipated Data Collection Activities
 - Required Collaboration and Meetings
 - Required or Desired Deliverables
 - RFP Budget
 - Required Contractor Qualifications/Experience
 - Request for Contractor's Proposed Methodology, Scope of Work, Schedule/Timeline, and Detailed Budget of Work
 - Proposal Scoring Criteria
 - Contact Information
 - Method of Proposal Submission and Deadline

66

**Post-Procurement Steps:
Staffing, Training,
Data Collection, Analysis**

67

Staffing: Recruitment, Selection and Hiring

- Large field-data collection projects require appropriate staffing:
 - Survey Manager (and optional Asst. Manager) and Field Staff
 - Using current staffing resources for data collection/hiring has not worked in the past—current staff are often already overworked
- Timing of recruiting, hiring and training field staff needs to account for project timeline



68

Survey Manager

The success of the survey depends on the manager’s abilities to complete their tasks:

- Verify and/or update mapped locations and types of structures as required
- Communicate with community members and answer questions
- Conduct PR activities including radio announcements and social media promotion
- Review and certify field staff hours and mileage as necessary as well as survey submissions
- Participate in daily meetings (in person or via phone) with field staff and survey coordinators to address issues raised in their reports and to check on their progress
- Conduct follow-up visits and verification of data
- Regular awarding of raffle prizes and distribution of incentives for survey completion

69

Field Staff

Consider critical qualities, such as social skills and interest in meeting and talking to other people

Determine if specific language skills, valid driver's license, access to a working vehicle, and passage of a background and drug test will be required (or desired)

Overview of role:

- Outreach and follow-up at sampled housing units to achieve highest possible survey response rate, including extensive use of in-person, email, phone and other contact methods. This includes physical drop-off of door hanger or other survey materials to all households in the survey sample.
- Efficient planning and completion of assigned fieldwork; including review and verification of mapped locations, staggering of times and days of visits, and batching of proximate cases
- Public relations – in-person, electronic & phone methods, and radio & social media promotion
- Front-line customer service, including answering community/tribal member questions

70

Training



Procedures:

- Familiarity with data collection instrument and methods (e.g., in-person household survey)
- Coordinate work with survey manager and other field staff

Protocols:

- Safety, professionalism, and courtesy

71

Staff and Case Management

Ensure Project Stays on Timeline and Within Budget:

- Hiring staff from communities throughout the survey area (if possible)
- Assigning staff cases in their area
- Tracking staff hours & miles
- Tracking completed cases over time
- Using project dashboard or other system to track productivity and performance (and reassigning work as necessary or appropriate)



72



73

Quality Assurance and Control

Issue and Incentive Log:

- Tracks issues including skipped questions, typos, and answers that are major outliers (e.g., households that earn more than \$1,000,000 or less than \$1,000 per year)
- Ensures households receive incentives for completed surveys in conjunction with helping correct any issues

Data Cleaning

- Data may need to be cleaned and reformatted to be useful for analysis purposes—ensuring outliers not picked up in the issue log are not typos or other issues

74

Confidentiality

Responses must be kept confidential to receive honest responses




Use a unique survey ID code to refer to cases (instead of names or addresses)

Those handling data must sign confidentiality agreements

Data should be anonymized and “sanitized” after collected

75

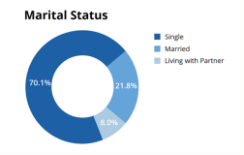
Securing the Data During and After Collection

-  Password protected tablets
-  Password for data collection application
-  Secure storage of data to prevent data leaks

76

Data Cleaning, Compilation and Analysis

- Cleaning to Ensure Accurate Data
- Relational and other Statistical Analyses (e.g., what % of children live in an overcrowded home)
- Incorporate Existing Data for Comparison



Marital Status	Percentage
Single	70.1%
Married	21.8%
Living with Partner	8.0%

77

Reporting

Background & Methodology – Reasons for conducting needs assessment, steps taken to complete

Findings – Answers to research questions, amount and type of housing and services needed


Limitations – Acknowledging issues that may limit data accuracy or that compromised some aspect of the data collection effort

Lessons Learned – Use experience to inform future data collection efforts in order to improve the process

78


Other Data Products and Deliverables

- Data fact sheet handouts
- Graphs and visualizations
- Relational pivot tables
- Maps



79

Presentation of Results



- Presentations to tribal leadership and community
- Overview of methodology, findings, and recommendations
- Celebrate the community's contribution of time and information

80

Data Use for Planning, Grant Applications and Program Management

Examples:

- Support of regional Comprehensive Economic Development Strategy (CEDS)
- Update Community Profile; Data used to bolster strategic planning process
- Correct existing federal and other public data, especially with respect to seasonal residents and distortions caused by their demographics and income
- Used significant housing needs identified to request and receive standing tribal allocation of gaming revenue to housing program
- Used data to apply for CDC opioid overdose/addiction grant (as there was no inpatient service locally), and tribal AODA task force was created
- Worked on curriculum for dealing with veterans housing issues
- Supported application for Native CDFI

81


Data Storage, Sharing & Ongoing Reporting

- Data steward handles data for ongoing storage, reporting
- Past data steward roles:
 - IT Department with TDHE or Tribe
 - TDHE Administrator
 - Tribal College IT
 - Planning Department
- Steward helps maintain confidentiality, secures data and reports data to programs that need it

82

Session Wrap-Up

- Stakeholders
- Purposes and Goals
- Data Needs
- Structure of Needs Assessment
- Target Population
- Content of Survey, Focus Groups, Interviews and Community Meetings
- Data Collection Methods
- Public Relations
- Funding/Procurement
- Staffing, Data Collection, Reporting



83

Exercise #5: Next Steps – Jamboard Breakout

- Who will you talk to next to begin or continue the process?
 - Do you need funding? How can you get support/buy-in from necessary programs?
- How will you address the anticipated barriers that may prevent you from conducting a housing needs assessment?
- Begin to develop a timeline for a needs assessment project incorporating the aspects outlined in this training session and develop plans tied to the timeline

84

Thank You!

Q&A

- Any questions?
- If you have any questions later, our contact information is included in the next slide.

85

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86
