

Minnesota Home Ownership Center

Foreclosure Counseling Program

Satisfaction Survey Protocol Tips

Survey Overview

The National Industry Standards for Homeownership Education and Counseling recommend that “customer satisfaction surveys are used to evaluate the effectiveness of the counseling.” The National Foreclosure Mitigation Counseling (NFMC) program requires adherence to the National Standards. In a previous round of NFMC monitoring by NeighborWorks America they brought the lack of client satisfaction surveys to the attention of Minnesota Housing. As a result, effective with Round 5 of NFMC organizations need to have an agency protocol that outlines how and when they will conduct client satisfaction surveys. The Minnesota Home Ownership Center (Center) has developed a sample survey and provided some tips for developing a protocol for your use. However you may design a survey of your own.

Survey Administration

The Center recommends that surveys are administered via email. Using email to administer surveys helps contain costs and creates efficiencies. However, recognizing that not every homeowner uses email, we suggest use of a mail survey in tandem with the electronic email survey.

When to administer surveys

The best time to conduct a customer satisfaction survey is when the experience is fresh. If you wait to conduct a survey, the customer's response may be less accurate. The Homeowner may confuse their most recent visit with others to the agency. They may confuse your agency with another.

Recommendations for obtaining acceptable response rates:

- Inform clients during intake that they will receive a satisfaction survey at the end of clients working relationship with the agency.
- Obtain email addresses upon intake. To maintain confidentiality, mass emails should not be sent to homeowners.
- Consider the email address used for survey collection. It's possible your agency may need to create a specific email to collect this information.
- Mail and/or email surveys at a certain time every month to all whose case closed the previous month. This can be done by the counselor closing the case or an administrative professional.
- If surveys are mailed out, include a self addressed stamped envelope.
- Track the response rate. For surveys not returned within two weeks, attempt one follow-up as capacity allows.

Recommendations for reviewing survey results

- Compile the responses
- Manager review results quarterly
- Look for trends
- Report results back to staff

Benefits to assessing client satisfaction

- Gives your agency a chance to fix problems identified with the service given.
- Learn about the positives and negatives. This can help shape changes to the program in the future.
- Results can serve as proof that agency is addressing a real need in the community.

Tools

Another option to consider is using technology to aid in the administration and review of surveys. Here are a couple examples of useful tools.

- Survey Monkey (<http://www.surveymonkey.com>) can be used to create surveys and calculate results. Results can be entered manually by staff or Survey Monkey can create a link for people to take the survey via the internet. This program has a cost of roughly 24 dollars a month.
- Similar to Survey Monkey, Google Documents can help with creating a free online survey. Instructions can be found at: http://www.ehow.com/how_4615530_survey-using-google-documents-free.html

Survey template

The attached fillable survey is unlocked, so it can be branded with your organizations logo and/or questions can be added or personalized. Once locked the document becomes fillable.

To lock the template for distribution to clients the following steps should be taken*:

1. Click Review at the top of the document
2. Click Protect Document on the right of document- then choose Restrict Formatting and Editing
3. Press button in the middle of the right margin labeled "Yes, Start Enforcing Protection"
4. Set password

*These instructions are for Word 07'. Search Google for instructions with other versions of Word.

Additional considerations

- Instructions for saving a word document and attaching it to an email may be necessary, however users computer savvy enough to have Word should already know how to do this.
- If a Homeowner does not have access to Word software it may be necessary to cut and paste the survey questions directly into the body of the outgoing email message.

Foreclosure Counseling Program Client Satisfaction Survey

Introduction:

You recently worked with a Foreclosure Prevention Specialist [NAME HERE] to address your mortgage concerns. Please take a few minutes to complete the questionnaire below to assist with improving the counseling services of [INSERT ORG NAME]. Your responses will be anonymous and confidential.

Rating Scale

1 – Strongly Disagree, 2 – Disagree, 3 – Neutral, 4 – Agree, 5 – Strongly Agree

Question	1	2	3	4	5
1. The Foreclosure Specialist clearly explained the program and my options.	<input type="checkbox"/>				
2. The Foreclosure Specialist kept me informed of progress.	<input type="checkbox"/>				
3. The Foreclosure Specialist was professional.	<input type="checkbox"/>				
4. My calls were returned in a reasonable amount of time.	<input type="checkbox"/>				
5. I was able to solve the problem I came to the agency for help with.	<input type="checkbox"/>				
6. Overall I am satisfied with the services I received.	<input type="checkbox"/>				

7.(a) Would you recommend this program to someone else? Yes No

7.(b) Why or why not?

8. What recommendations would you offer for improving the program?

Thank you for your time!

NATIONAL FORECLOSURE MITIGATION COUNSELING PROGRAM

TENNESSEN WARNING

We are committed to ensuring the privacy of individuals and/or families who have contacted us for assistance. We realize that the concerns you bring to us are highly personal in nature. We assure you that all information shared both orally and in writing will be managed within the limitations of law. Under Minnesota statutes, your name and address are public data. All other data we may ask about you is private data on individuals. Providing and agreeing to share your private data for this Customer Satisfaction Survey is voluntary and will not affect your eligibility for program services. We will share the data from this survey only with the following entities or their representatives for the purposes of program management and evaluation:

- Staff of this organization who need it to evaluate survey results
- NeighborWorks America, the entity mandated by Congress to account for how the program funds are used and determine the program's effectiveness, or its authorized representatives.
- The Minnesota Housing Finance Agency, the recipient of the grant for this program.
- The Minnesota Home Ownership Center, a contractor of the Minnesota Housing Finance Agency responsible for assisting program administration evaluation.
- Any other entities properly authorized under law to view it.