GUIDE TO FEEDBACK POLICY TEMPLATE

ABOUT THIS POLICY AREA

This policy guides how the organisation encourages and manages feedback from clients who use its services.

A written feedback policy is required as part of meeting Standard 5 (Feedback and complaints).

Standard 5 — feedback and complaints
The organisation advances the rights and responsibilities of people using its services by:

- *promoting opportunities for clients and other stakeholders to provide feedback*
- *using feedback received to improve services.*

Policy checklist
The following checklist will help you check that an existing policy covers this area adequately.

The policy should:

- ❑ explain how a service culture is developed that encourages open and honest communication
- ❑ say how feedback will be encouraged
- ❑ explain the ways feedback can be provided and offer anonymity to clients providing feedback
- ❑ say how records of client feedback and levels of satisfaction are kept
- ❑ say how information arising from feedback is compiled and used for continuous improvement
- ❑ contain clear procedures and actions
- ❑ indicate the timing of any actions
- ❑ show when it was approved
- ❑ show when it was last reviewed.

COMPLETING YOUR FEEDBACK POLICY

Using the policy template

The template provides some example statements. You can adapt these statements and include them in your policy or write your own statements to better suit the operations and services of your organisation.

To customise the policy template, click on the shaded sections <<Insert text>> and insert the information that is specific to your organisation.

When you have completed the policy template, delete the shaded instruction sections such as: *Refer to the feedback policy template guide for questions and/or examples to consider when customising this section.*

For further information on using the policy guides, refer to the information in *Using the policy templates and guides*.

Guidelines for each section of your policy

1. Purpose

When identifying the purpose of the policy, consider how it might apply to your client group/s and stakeholders. Do you need to make specific statements to ensure you are inclusive of particular groups, such as Aboriginal and Torres Strait Islander peoples, Australian South Sea Islanders, people from culturally and linguistically diverse backgrounds and people with a disability?

2. Scope

To determine the scope of the policy, consider the following questions:

- Does this policy apply to all your organisation's services and to all clients, agencies and stakeholders?
- Which staff or volunteers will be asked to collect feedback?
- What other methods may be used to collect feedback and protect anonymity?
- Are there some service areas, client groups or stakeholders where people may prefer to give feedback to an external person?

3. Policy statement

If you are adopting the policy statement in the template, consider whether there are any additional commitments your organisation wants to make.

In identifying the actions your organisation will take to implement this policy, you should include the following:

- fostering a service culture that encourages open and honest communication
- informing clients about the standard of service they can expect
- developing and promoting your client charter
- encouraging feedback and making it easy for people to provide feedback
- offering anonymity to people providing feedback
- recording and compiling information arising from feedback and using it to improve services.

4. Procedures

The procedures describe how your organisation achieves the aims and goals you have outlined in your purpose, scope and policy statement.

4.1 Information about service culture, standards and client rights and responsibilities

Describe the range of ways your organisation fosters a culture that encourages open and honest communication with clients and stakeholders.

List your organisation's written and visual resources that state what clients can expect from your service and how they may provide feedback (for example the client charter and, when appropriate, the service contract between the client and your service).

Client charter
Describe when and how your organisation will update its client charter, and the ways that it will be promoted. For example:

- a poster and information sheets available in all public areas of your organisation and other appropriate venues
- a copy for each new client.

Service contract
If your organisation signs service contracts or agreements with clients, how the contract is put into practice will depend on:

- exactly what service is being provided
- the laws and policies that directly relate to this service type
- the formality and duration of the relationship between the client and your service.

Describe when and how the service contract will be negotiated, and by whom. For example, a service contract or agreement may be discussed with a client during an intake assessment, or it could be signed by a client when they accept a place in your service.

Other resources
List the other ways your organisation will make information available to clients. For example:

- poster overview of client rights and responsibilities
- written summary of service standards for staff and volunteers to explain to clients
- information sheet about client rights and responsibilities.

Explain how your organisation will make information available in languages and formats appropriate to the range of communities and literacy level of clients with whom you work. In particular, consider those for whom written English is not the most useful option.

4.2 Informing clients
For each different service, describe when and how information will be provided to the client and who will be responsible for doing this. For example:

- by an intake worker during intake and assessment interview
- by an activity facilitator when a client attends an activity for the first time
- by a counsellor sending out information after a telephone contact
- by a key worker or support worker during their work with clients
- by a service coordinator at a group meeting of clients.

4.3 Promoting opportunities for client feedback
For feedback that is initiated by the client, describe:

- the different ways people can give feedback — who they can talk to or write to, and any other opportunities that your organisation provides (for example, during group functions or via a suggestion box)
- who will be responsible for receiving the feedback, and how they will record it
- what action will be taken in response to feedback (including referring the client to the complaints procedure, if appropriate).

For feedback sought by your organisation, describe:

- the ways your organisation will collect feedback (for example, exit interviews, satisfaction surveys, consumer focus groups)
- how interviews, consultations or formal surveys will ensure all interested people have a voice on the range of issues
- when and how often feedback collection will be undertaken, who will do it, and how the results will be assessed.

4.4 Using client feedback for service improvement
Describe the ways that your organisation will document the feedback it collects and collates. Consider the following processes:

- a feedback file or database, with records of all individual instances of feedback in date order
- a record on the client file (when feedback is not anonymous) of the comment made and response given
- a regular feedback report to senior staff/management, summarising individual instances of feedback for the period, and actual/recommended responses
- a file containing completed client surveys from individual clients
- a survey report summarising findings and proposing actions in response.

Describe when and how this information will be reviewed, who will be responsible for doing this, and how the organisation will use feedback to improve services. For example:

- **for service planning** — including a review of client feedback in all service planning, monitoring and evaluation activities
- **for decision making** — including a report on client feedback as a standard item on staff and management meeting agendas.

5. Other related policies and documents
The feedback policy should be linked to:

- the complaints by clients policy that outlines how the organisation will manage complaints from people using its services, and ensures their right to have complaints fairly assessed
- the confidentiality policy that outlines how the organisation protects client rights to confidentiality and privacy
- the organisation's client charter and service contract (if used)
- any forms used for collecting client feedback
- relevant policies and procedures about record keeping or data collection.

6. Review processes
Consider how often the policy should be reviewed and the process for doing this:

- **frequency of review:** Most policies benefit from an annual review. The experience of implementing the policy is used to decide which changes are necessary. Consider reviewing your feedback policy as part of an annual review of your organisation's client-related policies. At the same time, review the effectiveness and outcomes of your client feedback collection. If your organisation is small, you may consider reviewing your policies over a three-year period. Critical incidents may prompt you to review the policy ahead of schedule.

- **responsibility for the review:** In most organisations, the person accountable for client services would be responsible for reviewing this policy. In small organisations, this may be a project coordinator or the manager. In larger organisations, this may be a manager of client services or programs.
- **process for the review:** Decide which particular staff, volunteers, external people and organisations will provide input to the policy review. Ask clients about their experience of providing feedback.
- **decision-making process:** Who will review draft changes to the policy and approve changes? What will be the timeframe for the review process?
- **documentation and communication:** What records of the policy review process are needed? How will changes to the policy be communicated to staff implementing the policy? In a small organisation, this may be as simple as noting the changes at a staff meeting. In a larger organisation, an email memo may be needed.
- **key questions for the review:** Is the policy being implemented? Are procedures being followed? Is the policy clear? What has changed that may prompt a change to the policy? Have particular stakeholders had difficulty with any aspect of the policy? Can their concerns be resolved? How does the policy compare with that of similar organisations?