***Template Logbook*: How-to-use guidance**

# Introduction

This document describes the *Template Logbook*, a tool for implementing the *Operational Guiding Principles and Data Standards*. This how-to-use guidance will help practitioners working with community feedback mechanisms (CFMs) in its contextual application and adaptation to meet individual, joint/inter-agency, and collective needs for documenting and classifying community feedback.

The *Template Logbook* provides a framework for documenting and using community feedback and is a core tool for feedback management. Complete with a taxonomy that can be used to classify feedback for action, it primarily supports the enactment of Standard 2.4 of the *Operational Guiding Principles and Standards*.

***We systematically and safely gather community feedback by:***

*2.4 Ensuring feedback data gathered across different feedback channels and systems can be collated and analysed together by requiring all organisations collecting feedback to systematically document the same type of information on:*

* *Where feedback data is coming from (the communication channel and administrative area),*
* *What information is gathered at the time feedback is received (details and nature of the feedback, to the level that is relevant and appropriate),*
* *What actions are taken to address the feedback, immediately upon receipt and later as follow up for the closure of open and referred tickets (if applicable).*

Documenting community feedback in this way has implications for other activities that organizations may undertake to strengthen community feedback mechanisms (CFMs) at multiple levels and can reinforce or facilitate the achievement of several other standards as well.

**In addition to the above, using the *Template Logbook* to document community feedback also enables:**

1. A simple and common approach to understanding and managing feedback based on its characteristics and a standard definition for feedback categories and other data fields, building on the foundations that are established under the first Operational Guiding Principle.
2. A safe and efficient sharing of community feedback for referral and response of individual feedback tickets, with the option to identify and ‘tag’ feedback as either sensitive and/or critical to ensure the appropriate actions are taken in accordance with Operational Guiding Principle 3.
3. A structured analysis of feedback information coming from various sources – whether formal or informal–together with other response information that supports response-level decision-making as outlined in Operational Guiding Principle 4.
4. The tracking of decisions and actions in response to community feedback, and the adaptation of programs and strategies for meeting the needs of communities and working towards common objectives for the response, in accordance with Operational Guiding Principle 5.

# General considerations for feedback management

The following considerations are relevant to individuals, such as feedback managers and team leaders, or units responsible for the following tasks:

* Preparing community-facing staff, field teams, and CFM teams to collect community feedback.
* Examining feedback requiring action, referring feedback tickets, and following up for purposes of tracking and loop closure.
* Performing quality control and monitoring adherence to standard protocols.
* Preparing feedback (summaries or datasets) for reporting, analysis, and action.

The *Template Logbook* requires users to understand and apply several important terms.

Figure 1: Differences between some of the terms used for feedback management.

|  |  |  |
| --- | --- | --- |
| “Feedback” vs. “Feedback ticket” | “Response” vs. “Loop (or ticket) closure/resolution” | “Protocol” vs. “Procedure” for feedback management |
| Feedback refers broadly to the information and insights generated by community members in any setting (whether proactively gathered or passively encountered).  When a piece of feedback is recorded, we have created a feedback ticket. These can be open for further action or closed (either because action cannot be taken, or it has been taken, with this decision being communicated to the satisfaction of the individual providing feedback to qualify as resolved). | A response to feedback is always given to acknowledge that feedback and to either:   * Answer it in a satisfactory way immediately, which can be done for certain questions or issues, or * Indicate how and when the individual providing feedback will have their issue resolved.   Feedback can be resolved without creating a ticket, but we should aim to resolve all feedback for which a ticket is created. | The standards for how feedback is responded to, the conditions for creating a feedback ticket, and the steps that should be followed to ensure resolution of open feedback tickets are all components of a protocol for feedback management that can exist for individual, joint/inter-agency, and collective mechanisms for feedback.  Standard operating procedures can help individuals who play a role in feedback management translate these protocols into distinct actions as part of their usual responsibilities. |

These definitions are relevant for understanding links between the documentation of community feedback as articulated in Standard 2.4 and the broader feedback cycle and corresponding standards:

**Standard 3.3:** Community-facing staff and field teams should prioritize immediate **response** (and where possible, **resolution**) to **feedback** where this is appropriate. If it is unrealistic to record individual feedback (for example, where primary activities are not feedback-focused), it is important to share observations at specified periods about which questions, concerns or issues recur and/or have an impact on discriminated/marginalized groups.

**Standard 3.4:** If responsibilities for gathering feedback are part of the staff and teams’ core responsibilities, and if individual feedback is encountered that requires further action, the feedback should be recorded, and a **ticket** created as soon as possible. Alternatively, the provider should be re-directed to an appropriate channel according to the correct **protocol** **for feedback management**.

**Standards 1.6 and 3.6:** To ensure protocols are adhered to, the necessary steps and considerations should be integrated into the relevant **SOPs** to support staff responsibilities, whether their roles are primarily as part of a formal feedback channel or not.

# Description of the *Template Logbook*

## What is the *Template Logbook*?

The *Template Logbook* is a spreadsheet containing fields for documentation of community feedback that allows adaptation to the use case and according to the operational set-up for the different channels for feedback. It is not intended as a ready-to-use form for recording community feedback, but rather a guide containing the relevant data points, their characteristics, and categories for application. How the template is applied and reflected in the processes and tools used for feedback documentation and tracking will vary depending on the feedback channel, technology chosen, and more. Some of this will be explored in the sections that follow. Figure 2 shows a screenshot of the *Template Logbook* for reference. It contains three tabs, which are numbered and explained below.

A screenshot of a computer

Description automatically generatedFigure 2: Screenshot showing one of three tabs in the Template Logbook

## The first tab: Main Template

The first tab is the main template and includes all the minimum, optional, and recommended fields to satisfy the necessary requirements for documentation of feedback to satisfy Standard 2.4.

* The yellow fields must be documented to meet minimum standards.
* The grey tabs are optional and should be documented only if appropriate to do so.
* The light blue fields are recommended and can be used to enhance standards for documentation in cases where a mechanism possesses additional capacity.

The categories for documentation are illustrated in Figure 3 together with the minimum, optional, and recommended fields. Color codes, data field instructions, formatting considerations, and HXL tags for optional upload to HDX can be found in the *Template Logbook* document.

Figure 3: Document categories

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Documentation category | Description | Minimum fields | Optional fields | Recommended fields |
| Feedback metadata | Information about the source of feedback that tells us where and through which channel feedback is received. | * Basic location data: Administrative areas 1 and 2 * Feedback channel | * Detailed location data: Administrative areas 3and 4 * Country name | * Location codes * Country codes |
| Feedback content | Information relating to the characteristics of feedback (including the type of feedback and information about the feedback provider, if appropriate). Where possible, information exchanged should be verified with feedback providers to confirm the details are accurate and they are fully aware of the feedback process. | * Unique ID * Date of receipt * Submitted by * Consent to process * Age range * Sex * Language of interaction * Feedback comment * Operational relevance * Broad feedback category * Sensitivity * Criticality | * Name of feedback provider * Contact details * Preferences for communication | * Provided independently or with assistance * If with assistance, reasons for why * Diversity factor * Specific feedback content categories |
| Feedback follow up, tracking, and resolution | Information about the protocols followed and the process of referral and response should be regularly updated and tagged for purposes of supporting monitoring, analysis, advocacy, and improving communication with communities. | * Protocol followed * Date of referral * Current case status * Date of case closure | * Acknowledgement and response * Key quote | * Thematic relevance |

The minimum requirements for documentation as outlined above and in Standard 2.4 should be applied irrespective of the type of channel through which feedback is received. For fields that may not always have a determined value, category options have been provided that can be used to indicate this.

In general, contextually appropriate categories should be chosen to meet pre-identified information needs specific to the program(s) and activities supported; however, correspondence to the above should be established to meet minimum standards for collective purposes.

## The second tab: Feedback Taxonomy

The feedback taxonomy provides common categories and definitions for classifying community feedback, along with recommendations for further sub-categorization of these main categories. It is intended to support discussion for how feedback classification and documentation can reinforce protocols and enable safe and efficient sharing of feedback for feedback management, in addition to informing analysis and serving a useful purpose for decision-making at multiple levels.

* The **definitions for the broad content categories** are of primary relevance as they can facilitate a conversation around standardization across different systems and mechanisms for feedback to serve response-level objectives.
* **Adoption of, or mapping of existing categories to, the broad content categories** in the standard taxonomy can support a standard approach not just to classifying feedback, but also to actioning it. It can be used as a framework for the development of protocols for feedback management, and therefore a means to consider how the mechanism is performing (with respect to access/coverage of feedback issues, protocol adherence, and loop closure).
* **Consideration of the recommended sub-categories** can further support analysis and discussion for potential interoperability of different digital solutions supporting feedback management, where this is desired and appropriate. The degree to which the different channels, systems and mechanisms for feedback adopt the same level of categorization will determine how well they are linked and can serve objectives for the response.

It is important to note that all tools used for feedback management, including their protocols, are integrated – this means that the way we document feedback should inform what is done with it, and vice versa. Reference documents or common tools for feedback data collection and categorization, standard messaging, service mapping, and feedback management should align, and be maintained in accordance with **Standard 5.1.**

## The third tab: Operational Relevance

The operational relevance tab provides a standard list of categories (with definitions) that can be used to populate the corresponding field in the main template. This field is important not only in providing a high-level view of the general type of intervention the feedback concerns, but it is usually indicative of which group of stakeholders are best placed to address the feedback if it requires referral. Depending on the scope of the CFM, the main technical sectors of a humanitarian response can be used. If the scope is more limited, use project or activity names.

Any standard operating procedures developed for the documentation, referral, and reporting of community feedback should reflect the requirements indicated in the common protocols established under Standard 1.3 and as specified under Standard 1.4.

# Considerations for application of the *Template Logbook*

## Documenting individual and group feedback

Systematic documentation of both individual and group feedback ensures a range of feedback information from different modalities can be analyzed together. This can be done in either digital or in hard copy (and digitally transcribed later). Examples of these can be found together with the *Template Logbook* in the IASC resource library.

**Documenting group feedback:** Selection of the option “Mixed group of people” under the fields *Age Range* and *Sex* in the *Template Logbook* is appropriate for documenting feedback during focus group discussions, community meetings, and other group-centered community mobilization activities. Where possible, general distributions should be noted, especially if raised feedback is relevant to a specific diversity factor. Community-facing staff and field teams encountering community feedback during their regular activities can also use this method for recording the main questions/issues received. These kinds of insights can complement formal feedback captured through other more structured channels.

**Documenting individual feedback**: Individual feedback documentation is common for formal feedback channels where feedback can be collected in a more structured way, such as helpdesks, hotlines, e-mail, messaging applications, and feedback boxes. It can also be integrated with other data collection tools used during household visits and key informant interviews. Even in informal or group feedback settings, individual feedback tickets are created because they require a specific response. The conditions and requirements for this should be clearly outlined in the relevant standard operating procedures (SOPs) for community-facing roles. Should recording of the feedback ticket be inappropriate, impractical, or outside the primary responsibilities of the individual receiving the feedback, feedback providers should be re-directed as needed to an appropriate channel to have their individual feedback addressed.

## Documenting feedback informally and sharing observations and feedback summaries

Even in cases where formal feedback documentation is not possible, it is necessary to prepare community-facing staff and field teams with basic knowledge of frequently asked questions, and the protocols and responses for different kinds of feedback in accordance with standards 1.5, 1.6 and 3.1. They should know what to do, and what things to take note of, if encountered feedback requires swift or specialized action. The standards for documentation are still feasibly employed and the example forms provided with the logbook can be printed and used for this purpose.

Where non-face-to-face channels exist (such as hotlines, helpdesks, or other dedicated avenues) and field teams are not tasked with formally recording, transcribing, or sharing feedback in any form (digital or otherwise), they must be encouraged to share their observations and suggestions regarding community feedback trends in a manner consistent with their ways of working (for example, verbally during team meetings). This ensures that this knowledge can still feed into analysis and triangulation exercises under standards 3.4 and 3.5.

The participation of response partners that implement response activities in collective discussions around community feedback is crucial to ensuring the relevance and use of the common tools for feedback management. This not only ensures that the feedback process and information available to communities is understood by all and consistently communicated, but it also ensures that knowledge obtained from direct interactions with community members remains a central source of information irrespective of the level of digital capacity of the community-based structures or local actors in any given response.