

Customer Service Improvement Status Report

Bureau: Portland Housing Bureau
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Date: 2/4/2013

Bureau Mission and Goals: Please attach any copies of recent workplans or other policy documents that specifically address customer service improvement efforts in your bureau over the past year. Please describe how your strategic plans include customer service, and any plans for future customer service improvement efforts.

Reference materials: Strategic Plan (<http://tinyurl.com/b37u65d>)
PHB Business Operations Expectations (attached)
Subrecipient Contractor Equity Goal Setting Kickoff Meeting (attached)

The Portland Housing Bureau (PHB) serves those Portlanders whose need for safe, affordable housing is not met by the private market. Thus, our customers are both persons with unmet affordable housing needs as well as those local agencies, non-profits and developers with whom PHB partners to deliver services. The following three key documents speak to the bureau's commitment to customer service.

1. Strategic Plan – PHB has adopted a three-year strategic plan that was developed with extensive input from our customers, community stakeholders and housing system partners. The following is a sample of strategic goals identified in the plan that speak to customer service:

- Goal 2.C: Increase participation by minority-owned and economically-disadvantaged firms in the economic opportunities created by PHB investments
- Goal 4.B: Establish and meet highest standards for customer service and regulatory compliance
- Goal 4.C: Provide the community with clear, consistent, reliable data on Portland's housing needs and trends and on the performance of PHB's programs and projects.
- Goal 4.E: Ensure that a wide range of perspectives inform PHB's agenda, decision-making and policy-setting

PHB is managing efforts to meet these goals via a comprehensive implementation plan that details the numerous concrete steps and deadlines necessary to accomplish the strategic goals.

2. Business Operations Expectations – PHB business operations staff have committed themselves to a set of professional standards. Customer service is prominent amongst these. The following is an excerpt from this guiding document.

- "Customer service includes internal and external customers of PHB."
- "Go the extra mile for customers – it will be recognized."
- "Be supportive of other functional areas at PHB. We are all part of the same organization."
- "Respond to customer emails to let them know you are working on their request, and how it will be triaged."
- "Inform customers about project status so they know what is happening."
- "Create an extended absence greeting for your voicemail as well as an 'out of office' message for email directing customers to someone who can help them in your absence."

3. Subrecipient Contractor Equity Goals – As a part of PHB's larger equity agenda, PHB is working collaboratively with subrecipients to develop contract performance goals intended to

The Customer Service Advisory Committee is helping to implement Bureau Innovation Project #7 recommendations to improve the City of Portland's customer service. www.portlandonline.com/csac

Contacts: John Dutt, Office of Neighborhood Involvement, CSAC Chair, 503-825-2625 or Tenzin Choephel, CSAC Staff 503-823-3542

close disparities in access to PHB's services experienced by communities of color in Portland. The attached presentation from 5/17/2012 was used in a kickoff meeting with the contractors.

Customer Service Assessment: Please attach a copy of any recent customer service surveys or other customer service assessment tools including results. If you do not currently survey bureau customers, please explain any future plans to do so.

Reference Materials: *Strategic Plan* (<http://tinyurl.com/b37u65d>)
Portland Housing Advisory Commission (<http://tinyurl.com/47kxlee>)

PHB did not undertake a formal customer service survey in the past year. We do have plans for a survey to be completed in July of this year, and then annually with the start of each fiscal year. PHB takes very seriously the feedback and priorities of its diverse customer base, the following sample describes several ways in which the bureau listens and responds to this input.

- **Strategic Plan** – PHB's customer base had a deep and broad-based role in shaping the strategic plan. (See the reference materials listed above for additional detail.)
- **Portland Housing Advisory Commission (PHAC)** – As PHB's citizen advisory body, the PHAC provides PHB with ongoing feedback regarding the bureau's strategic direction.
- **Equity Council** - As PHB's customer base has made clear, PHB must make positive contributions to increasing Equity through its investments. The PHB Equity Council (EC) provides a forum for discussion and a source for advising PHB leadership on the following:
 - Implementation of the PHB Equity Agenda
 - Adapting and formalizing an Equity Lens for PHB decision making
 - Development of a PHB bureau equity plan (required for all city bureaus)
 - Liaison with the Citywide Equity Committee
- **Contract Management Workgroup** – PHB passes significant resources to "subrecipients" (primarily non-profits) to provide services. In order to improve the effectiveness of these partnerships with subrecipient contractors, PHB has established a standing contract management workgroup whose primary charge is to engage in troubleshooting and ongoing process improvement. The contract management workgroup has published a desk manual for training purposes at all levels.
- **Citizen Involvement In Budget Process** – In the FY 2013/14 budget development process, PHB responded to a criticism that some of the key vehicles for public input into PHB's process had come in years past after many budget decisions had been made. The bureau responded this year by working with the Coordinating Committee to End Homelessness (CCEH) and the PHB Federal Consolidated Plan development team to schedule, coordinate and facilitate a single public hearing in the community as part of the PHB public budget involvement process. This hearing took place on 11/14/2012 – well in advance of the Requested Budget submission deadline.

2013 Notice of Funding Availability (NOFA) – In response to feedback from developers regarding PHB's expectations of proposals in the 2012 NOFA, PHB has done three things to improve the 2013 NOFA process. First, PHB has held mandatory informational sessions for all parties submitting proposals in order to help ensure expectations are clear. Second, the bureau has revised the scoring methodology to be more structured and more easily interpreted by the developers. Third, through the revamped scoring methodology, PHB has significantly increased the ways in which development teams can receive credit for equity and diversity initiatives.

Workforce Development: Please describe any efforts you have made to develop customer service competency within your workforce in the areas of recruitment, training, and evaluation over the past year. Please share any details regarding progress in these areas over the past year (training program information, key bureau contacts, recruitment/evaluation material examples, etc.)

Recruitment

While the bureau's financial forecast has limited PHB's ability to recruit for vacant positions, PHB continues to prioritize hires that strengthen the bureau's customer service foundation. To this end, PHB will target candidates with a deep knowledge of:

- **Customer Service** – Candidates will illustrate an ability to provide customer-friendly operations and responsiveness to contractor and borrower questions.
- **Public Funding Stewardship** – Candidates will illustrate an ability to maintain sound financial management that minimizes disruptions to sub-recipient contractor projects and services.
- **Business Process Improvement** – Candidates will embrace the opportunities from process improvement and organizational development, which will focus on optimizing business processes that impact our customers.
- **Data Reporting** – Candidates will demonstrate a proven ability to both collect and report on key performance indicators that are valuable to PHB's partners and decision makers.

Education & Evaluation

Each member of the PHB administrative staff is held accountable to the bureau's "Business Operations Expectations" which set a standard for high-quality bureau customer service. Also, each member of the PHB staff is evaluated on customer service competency during his or her annual review. Customer service is considered a core competency for all staff.

Additionally, PHB is developing a Bureau-wide training plan which will encompass all trainings for all levels of staff and management, regarding compliance, equity/diversity and customer service. Each staff member will have an individualized training plan developed jointly with their manager to ensure staff receives trainings appropriate to their position and that are beneficial to the Bureau. PHB has also established a \$10,000 training fund for AFSCME Local 189 employees as stipulated in its collective bargaining agreement. This fund is intended to support ongoing professional development as opposed to current job-specific requirements.

BUSINESS OPERATIONS EXPECTATIONS, EFFECTIVE JULY 1, 2012

1. CUSTOMER SERVICE

- a. Includes Internal and External Customers of PHB
- b. Go the Extra Mile for customers
 - 1. It will be recognized
- c. Supportive of other functional areas at PHB
 - 1. We are all part of the same organization

2. TAKING INITIATIVE

- a. Make suggestions for improvement
 - 1. Identify potential solutions
 - 2. Be Proactive
- b. Let your supervisor know what you need from them to succeed
- c. Don't wait to bring an issue to your supervisor's attention
- d. Exhibit ownership of projects, activities, and responsibilities
 - 1. Be committed to quality and seeing things through to completion

3. TEAM MENTALITY

- a. Help each other succeed
- b. If one part of the team looks bad, then that will negatively reflect on the whole team
- c. Work together to find solutions to challenges
- d. Be a reliable back up
- e. Step up to help when you see someone struggling
- f. Encourage others and reward positive actions
- g. Constructively discuss negative actions to expedite improvement
- h. Share information that is helpful to others

4. NOTIFICATIONS

- a. Provide your supervisor advance notice of time you want to take off
 - 1. please use leave request form
- b. Receive advance approval from your supervisor if you want to change your scheduled work hours for any day
- c. Call or email your supervisor if you will be late or sick
- d. Include your supervisor on email correspondence when you believe they should be looped in
- e. Notify your timekeeper of leave time

5. EMAIL

- a. Expectation is that you will check your email at least hourly, unless you are in meetings or out of the office
- b. Expectation is that you will respond to customer emails letting them know that you are working on their request, and how it will be triaged among other requests for your assistance
- c. Expectation that you will inform customers about project status so they know what is happening with it
- d. Expectation is that you will create an extended absence greeting for your voice mail as well as an "Out of Office" message for email directing customers to someone who can help them in your absence.
 - 1. This is for leaves of one day or more

6. MEETINGS

- a. Attending Section Staff Meetings should be a priority

- b. Be prepared for meetings and flag issues for your supervisor in advance of complex or sensitive meetings

BY SIGNING THIS DOCUMENT, YOU ACKNOWLEDGE THAT YOU HAVE READ AND UNDERSTAND THE EXPECTATIONS FOR THE BUSINESS OPERATIONS TEAM.



PHB Sub-recipient Contractors Meeting

Equity Agenda

May 17, 2012



PHB Strategic Plan Investment Priorities

Priority 1 – Provide more rental housing for the most vulnerable people

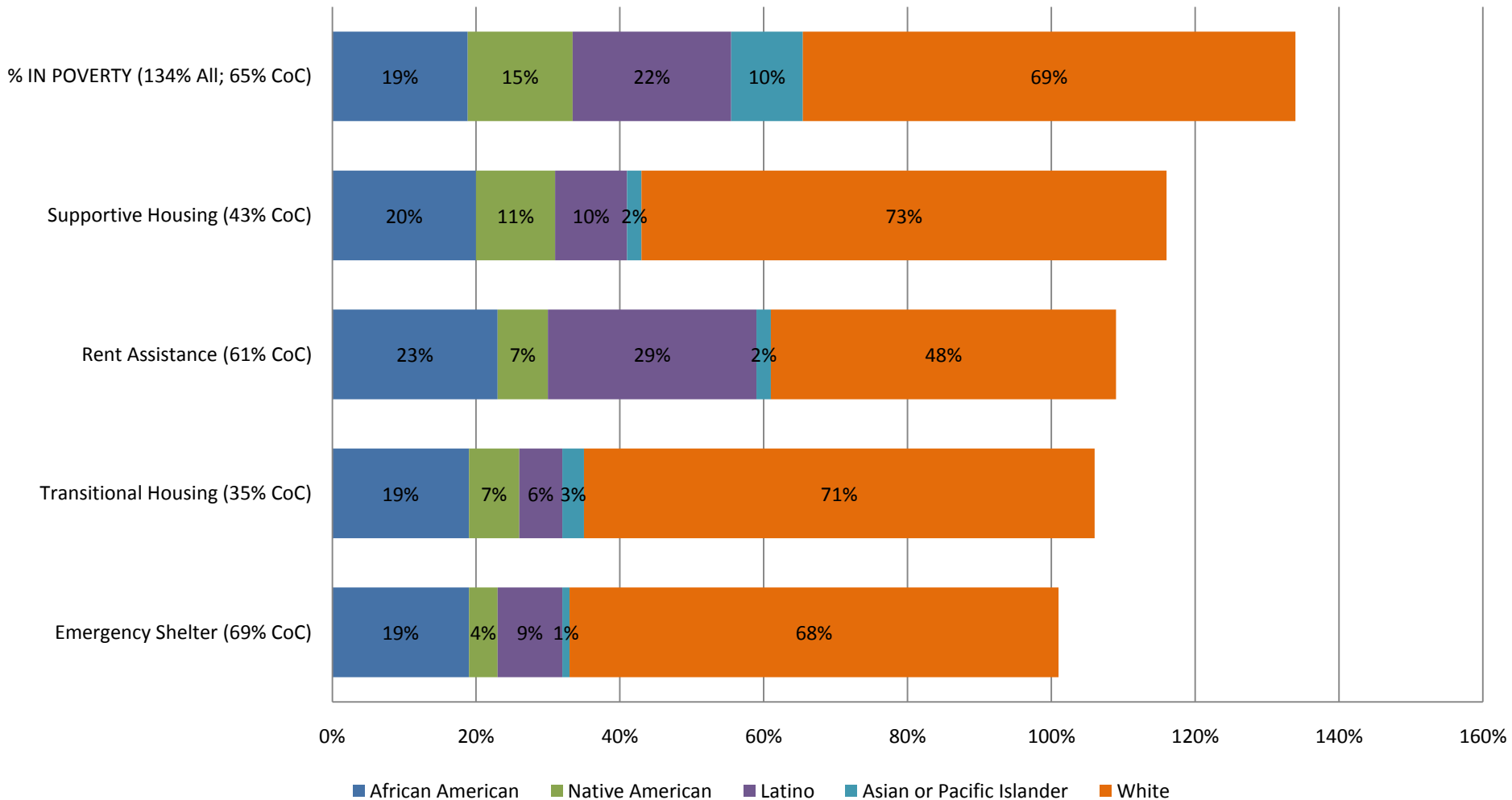
Priority 2 – Move people quickly from homelessness to permanent housing while preventing families from losing their homes (becoming homeless)

Priority 3 – Help Portlanders from communities of color buy a home or keep the home they already own

Priority 4 – Provide a safety net that includes shelters and other short-term help for low-income Portlanders who are homeless or at risk of homelessness.

Equity Goals by Strategic Plan Priority

Priority 2 & 4 - Move People from homelessness to permanent housing/Prevent housing loss; Safety net for those at risk of homelessness



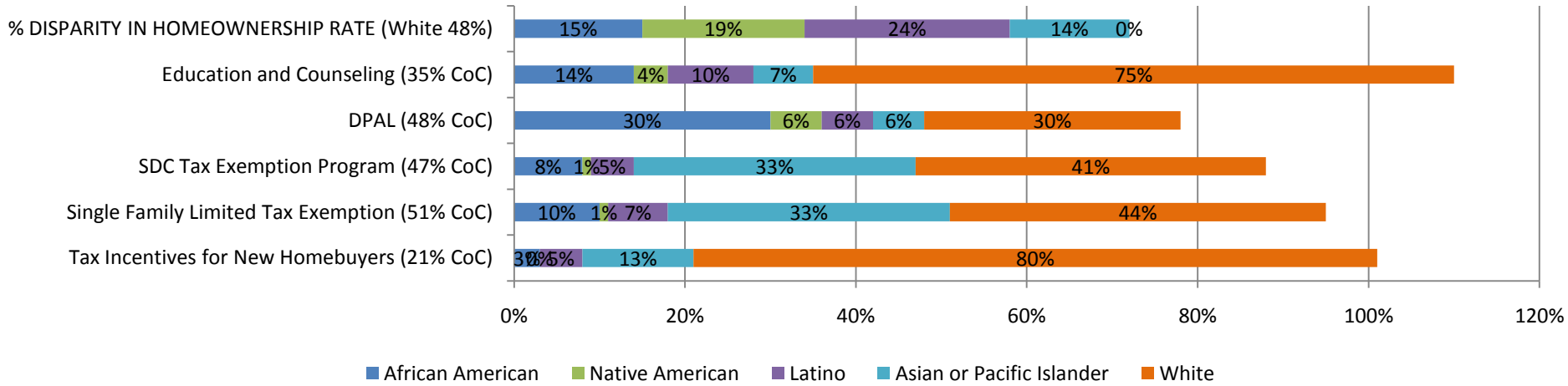
Example - Sub-recipient Contractor Equity Goal Setting

Priority 2 – Move people quickly from homelessness to permanent housing while preventing families from losing their homes (becoming homeless)

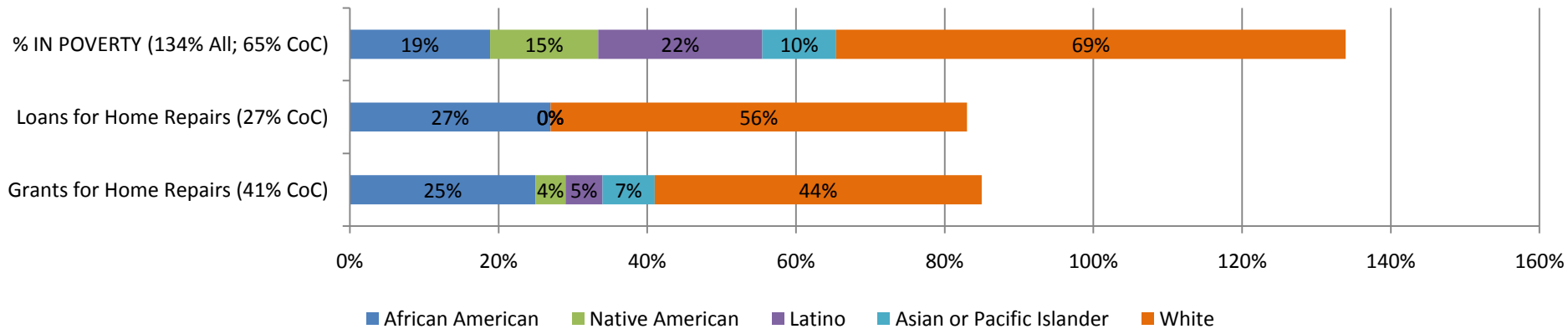
RENT ASSISTANCE		# Hshlds Served	African American	Native American	Latino	Asian Pacific Islander
OUTPUTS <u>Contractor A</u> (serves general population)		50	12%	7%	24%	1%
	Yr 1	50	15%	10%	24%	4%
	Yr 2	50	18%	13%	24%	7%
	Yr 3	50	19%	15%	24%	10%
OUTCOMES <u>Contractor A</u>						
	Yr 1	Describe organizational equity efforts				
		Continue effective delivery to Latino Community - Best Practice?				
OUTPUTS <u>Contractor B</u> (AA culturally specific)		10	75%	10%	10%	5%
	Yr 1	10	75%	10%	10%	5%
	Yr 2	10	75%	10%	10%	5%
	Yr 3	10	75%	10%	10%	5%
OUTCOMES <u>Contractor B</u>						
	Yr 1	Describe organizational equity efforts				
		Review Service Model - Learning for Other CS Providers? Collaborate/Refer to other CS Providers				

Equity Goals by Strategic Plan Priority

Priority 3 - Help Portlanders from communities of color buy a home



Priority 3 - Help Portlanders from communities of color keep the home they already own



Portland Housing Bureau

Example - Sub-recipient Contractor Equity Goal Setting

Priority 3 – Help Portlanders from communities of color to buy a home

EDUCATION & COUNSELING		# Hshlds Served	African American	Native American	Latino	Asian Pacific Islander
OUTPUTS Contractor A (serves general population)		200	10%	4%	24%	10%
	Yr 1	100	12%	10%	24%	12%
	Yr 2	100	13%	13%	24%	14%
	Yr 3	100	15%	19%	24%	14%
OUTCOMES Contractor A						
	Yr 1	Describe organizational equity efforts				
		Continue effective delivery to Latino Community - Best Practice?				
OUTPUTS Contractor B (NA culturally specific)		50	5%	80%	10%	1%
	Yr 1	30	6%	80%	10%	2%
	Yr 2	30	7%	80%	11%	3%
	Yr 3	30	7%	80%	12%	3%
OUTCOMES Contractor B						
	Yr 1	Describe organizational equity efforts				
		Review Service Model - Learning for Other CS Providers Collaborate/Refer to other CS Providers				

Example - Sub-recipient Contractor Equity Goal Setting

Priority 3 – Help Portlanders from communities of color keep the home they already own

GRANTS FOR HOME REPAIRS		# Hshlds Served	African American	Native American	Latino	Asian Pacific Islander
OUTPUTS Contractor A (serves general population)		125	24%	4%	5%	7%
	Yr 1	75	24%	7%	10%	8%
	Yr 2	75	24%	10%	15%	9%
	Yr 3	75	24%	15%	22%	10%
OUTCOMES Contractor A						
	Yr 1	Describe organizational equity efforts				
		Continue effective delivery to African American Community - Best Practice?				
OUTPUTS Contractor B (Latino culturally specific)		50	10%	5%	80%	2%
	Yr 1	30	10%	5%	80%	2%
	Yr 2	30	8%	7%	80%	3%
	Yr 3	30	9%	8%	80%	3%
OUTCOMES Contractor B						
	Yr 1	Describe organizational equity efforts				
		Review Service Model - Learning for Other CS Providers Collaborate/Refer to other CS Providers				