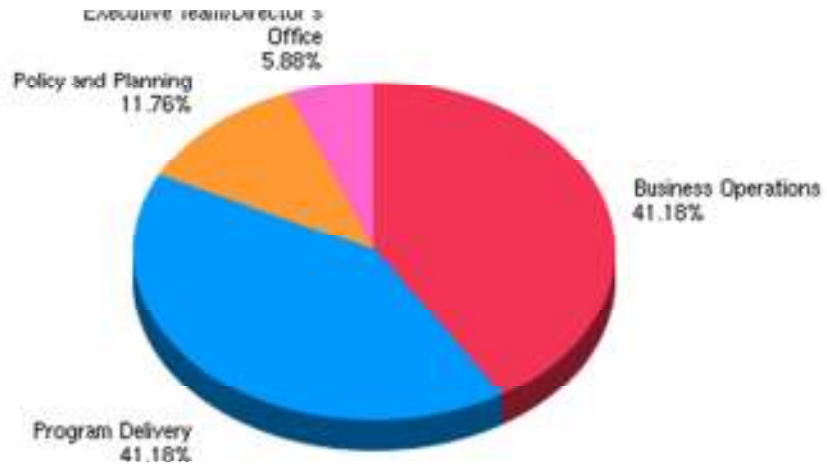


# Completed & Partial Response Summary Report

August 18, 2010

## 1. In which section of PHB do you work?



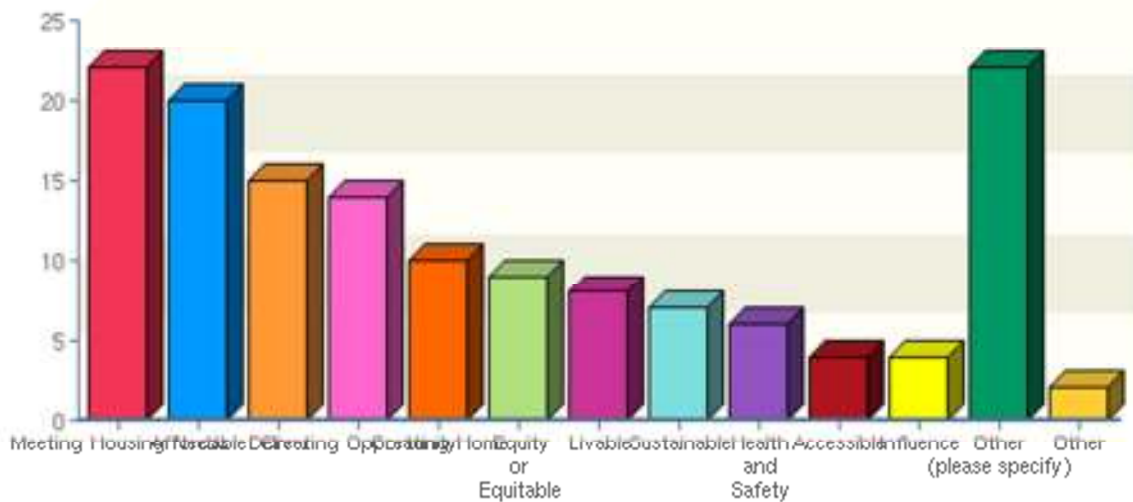
Item	Count	Percent %
Business Operations	21	41.18%
Program Delivery	21	41.18%
Policy and Planning	6	11.76%
Executive Team/Director's Office	3	5.88%

## 2. What is your team, program or service area?



Item	Count	Percent %
Finance & Accounting	6	12.00%
Asset Management	3	6.00%
BARSIT	3	6.00%
development	3	6.00%
Delivery	2	4.00%
Finance	2	4.00%
HMIS	2	4.00%
Housing Development Finance	2	4.00%
Neighborhood Housing	2	4.00%
NHP	2	4.00%
Program Delivery	2	4.00%
SHPP	2	4.00%
Accounting & finance	1	2.00%
Admin	1	2.00%
Asset Management/Loan Servicing	1	2.00%
Business Analysis Research Section and Information Technology	1	2.00%
Business Operations	1	2.00%
Director	1	2.00%
Ending Homelessness	1	2.00%
Ending Homelessness Initiative	1	2.00%
Grants/loans	1	2.00%
HDF	1	2.00%
homeless/access	1	2.00%
Neighborhood Housing Indirect	1	2.00%
Neighborhood Housing Programs	1	2.00%
not sure	1	2.00%
PIO	1	2.00%
Policy & Planning	1	2.00%
Policy and Planning and community outreach	1	2.00%
Policy and Planning Resource Development	1	2.00%
Public Involvement; Legislative Affairs	1	2.00%

**3. Which of the following words or phrases do you feel will help PHB convey its purpose, mission, and vision in a compelling way? Check your top 3 (including words or phrases not listed using the**



Item	Count	Percent %
Meeting Housing Needs	22	44.00%
Affordable	20	40.00%
Deliver	15	30.00%
Creating Opportunity	14	28.00%
Creating Home	10	20.00%
Equity or Equitable	9	18.00%
Livable	8	16.00%
Sustainable	7	14.00%
Health and Safety	6	12.00%
Accessible	4	8.00%
Influence	4	8.00%
Analyze	2	4.00%
Other (please specify)	22	44%
Others: Other (please specify)		
Fiduciary	2	4.00%
affordable home	1	2.00%
assess unmet housing needs and develop resources, strategies and programs to meet them	1	2.00%
Build a sustainable affordable housing supply	1	2.00%
continuum	1	2.00%
Effective	1	2.00%
Ensure housing needs are met for the most vulnerable populations	1	2.00%
filling gaps	1	2.00%
Helping Portland	1	2.00%
Housing access and opportunity for everyone, especially for our city's very low-income and/or marginalized residents.	1	2.00%
Housing Stability	1	2.00%
I can't answer this	1	2.00%
I would prefer to participate in a brainstorm. I like "communities of opportunity."	1	2.00%
Influence the creation of equitable complete communities	1	2.00%
mission and vission are	1	2.00%
Not provided by the market	1	2.00%
safe and decent	1	2.00%
Stability	1	2.00%
stable housing	1	2.00%
supporting affordable housing	1	2.00%
until I know what the purpose	1	2.00%

**4. PHB has committed to reflecting its Core Values in how it conducts business with its customers. Name 2-3 core values that you would like to be associated with PHB.**

**4a. 1)**

Item	Count	Percentage
equity	8	16.33%
Accountability	2	4.08%
Efficiency	2	4.08%
honesty	2	4.08%
Transparency	2	4.08%
Accountability	1	2.04%
accountable	1	2.04%
Accountability in delivery and performance by PHB	1	2.04%
Affordable Housing	1	2.04%

Be respectful	1	2.04%
Broad, all inclusive housing solutions	1	2.04%
Clearly defined community participation process	1	2.04%
Collaborative	1	2.04%
conscientious	1	2.04%
consistent definitions through out the community	1	2.04%
Effective	1	2.04%
Effectiveness	1	2.04%
Equality	1	2.04%
fairness/equity	1	2.04%
Focus	1	2.04%
Helping to plan and build for Portland's future housing needs	1	2.04%
Honesty and integrity	1	2.04%
Housing	1	2.04%
Housing gives people an opportunity to build better lives. To succeed you need a place to call home.	1	2.04%
Innovation	1	2.04%
integrity	1	2.04%
Integrity (in strategic planning and programming)	1	2.04%
knowledgable	1	2.04%
Opportunity	1	2.04%
Respect	1	2.04%
Responsible	1	2.04%
Responsive	1	2.04%
Service	1	2.04%
Social equity	1	2.04%
sustainable	1	2.04%
sustainable diverse communities	1	2.04%
Sustainable well designed housing	1	2.04%
Transparent	1	2.04%

**4b. 2)**

Item	Count	Percentage
Stewardship	5	10.42%
Accountability	3	6.25%
Affordability	2	4.17%
Transparency	2	4.17%
Accessible	1	2.08%
Accountability (of funds and outcomes)	1	2.08%
Accountability in delivery and performance by funding recipients of PHB	1	2.08%
Affordable secure and community supported environments	1	2.08%
Collaboration	1	2.08%
compassionate	1	2.08%
Consistency	1	2.08%
dedicated	1	2.08%
Do not judge	1	2.08%
Efficiency	1	2.08%
efficient	1	2.08%
equity	1	2.08%
Fairness	1	2.08%
fiscal responsibility	1	2.08%
Focus	1	2.08%
Grants	1	2.08%

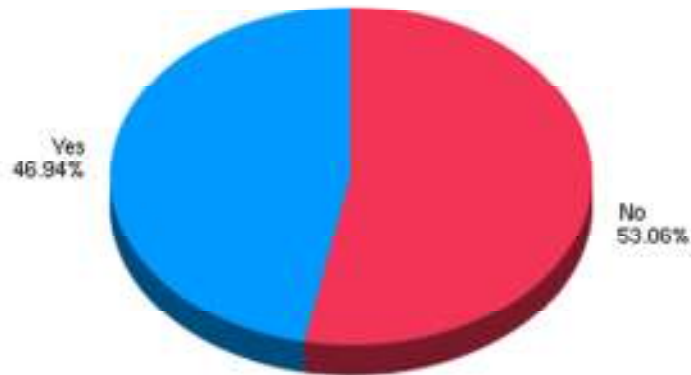
hard work	1	2.08%
Humility	1	2.08%
Innovation	1	2.08%
integrity	1	2.08%
Livability	1	2.08%
Meaningful	1	2.08%
No one should be without a safe, stable place to call home.	1	2.08%
Partnership	1	2.08%
PHB is working to make housing accessible to all of Portland's very low income communities	1	2.08%
Proactive	1	2.08%
Professionalism	1	2.08%
provide equitable opportunities	1	2.08%
relevant	1	2.08%
Respect	1	2.08%
Responsibility	1	2.08%
Responsible	1	2.08%
Responsive	1	2.08%
Responsive solutions to the market conditions and needs	1	2.08%
standard measures	1	2.08%
Supportive Services	1	2.08%

**4c. 3)**

Item	Count	Percentage
creativity	2	5.56%
equity	2	5.56%
Transparency	2	5.56%
Ability to deliver	1	2.78%
Accuracy	1	2.78%
Assistance	1	2.78%
Capability	1	2.78%
Collaborative	1	2.78%
Commitment to equity	1	2.78%
common reporting	1	2.78%
Compliant	1	2.78%
Consistant	1	2.78%
creative	1	2.78%
customer friendly	1	2.78%
data-driven	1	2.78%
Decisiveness	1	2.78%
deliver in a timely manner	1	2.78%
Effectiveness (directing resources where they make the greatest impact for those most in need)	1	2.78%
Efficiency	1	2.78%
equitable	1	2.78%
innovativeness	1	2.78%
Integrity	1	2.78%
Leadership	1	2.78%
Loans	1	2.78%
Meeting needs for families, single occupants, and many others with low and middle incomes.	1	2.78%
Needs-based planning	1	2.78%
openness/transparency	1	2.78%
Opportunity	1	2.78%
Outcome focused	1	2.78%

Reliability	1	2.78%
Responsibility	1	2.78%
Responsive	1	2.78%
The public sector, especially at a local level, has the ability and the obligation to creatively address the housing needs of everyone in the community, especially where those needs are not met by the private sector.	1	2.78%

**5. Are you aware of overlapping programs of similar purpose that are funded by other agencies?**



Item	Count	Percent %
No	26	53.06%
Yes	23	46.94%

**6. We want to ensure that PHB is a high performing agency.**

**6a. 1)**

Item	Count	Percentage
Asset management and HDF alignment	1	2.08%
Back to basics - housing is our core competency	1	2.08%
Be present at all of the neighborhood fairs	1	2.08%
better communication about rational behind decisions	1	2.08%
Bring more funding in the door, e.g. housing bond, other resource development activities	1	2.08%
clarity over priorities	1	2.08%
consistent definitions through out the community	1	2.08%
Contract compliance and consistency	1	2.08%
Create workable processes that work for all, that are as streamlined as possible (not so many hands in the pot)	1	2.08%
Crisp and Clear Customer Service Expectations	1	2.08%
Cross functional training	1	2.08%
Define and solidify PSH definition and inventory.	1	2.08%
Define what a high performing agency is. # served, housing created, what is success define it.	1	2.08%
Defined Mission	1	2.08%
Determine the long term goals	1	2.08%

Develop a clear and compelling business model that builds on our strengths and provides direction to how we want to do business	1	2.08%
Develop broad message for housing	1	2.08%
Discontinue outsourcing	1	2.08%
Efficiency	1	2.08%
Equity	1	2.08%
equity/diversity education	1	2.08%
Focus funding to those at risk of losing housing	1	2.08%
Greater empowerment and involvement of staff	1	2.08%
Improve the portfolio.	1	2.08%
Inter-departmental communication	1	2.08%
Internal Communications	1	2.08%
knowledge of the work of each department	1	2.08%
less bureaucracy	1	2.08%
More (noncatastrophic) mistakes	1	2.08%
More delegation from Exec team to other managers: end the bottleneck	1	2.08%
More standardize business process	1	2.08%
No more lay-off	1	2.08%
Pinpoint top two programs; then refine processes and cut bureaucracy (red tape) to achieve building needed housing units.	1	2.08%
Prioritize	1	2.08%
Process improvement	1	2.08%
Quality and healthy work environment	1	2.08%
recognizing hard work of staff	1	2.08%
secure funding resources	1	2.08%
Solid communications and public involvement plan	1	2.08%
Staff training	1	2.08%
Streamline operations	1	2.08%
Streamline Processes	1	2.08%
Streamline subrecipient contract development, tracking, reporting, and monitoring.	1	2.08%
Streamline work	1	2.08%
strengthen relationship with Oregon ON	1	2.08%
Strong mission, strategic plan	1	2.08%
Sustainable Practices	1	2.08%
Understanding of each others activities	1	2.08%

**6b. 2)**

Item	Count	Percentage
Accuracy	1	2.27%
Better tracking for loans portfolio	1	2.27%
Branding, outreach, marketing	1	2.27%
Change from the past	1	2.27%
Consolidated and up to date systems	1	2.27%
Continue providing services directly to people, but people of a wider income spectrum	1	2.27%
Cross-train employees	1	2.27%
Dedicate resources necessary for successful Loan Portfolio Management	1	2.27%
delegation of authority down to organization	1	2.27%
Determine a clear and inspiring mission, vision and goals that is responsive to the housing needs of all Portlanders.	1	2.27%
Development of Staff and Managers	1	2.27%
Electronic Documentation and filing which meets the new city council policy and city auditors' guidelines.	1	2.27%
eliminate Narrow focus, spending all dollars in one area	1	2.27%
Employee growth & development	1	2.27%

enlist the staff that now the work to help set up the process	1	2.27%
Establish an Affordable Housing Advisory Committee to provide public insight into our decision making process	1	2.27%
Focus	1	2.27%
Identify and/or develop staff capacity for data analysis for improved reporting, program evaluation, and decision-making.	1	2.27%
Identify best use of employees	1	2.27%
Identify mantra: 1) Are we an "action" bureau where we do the work; or 2) Are we a "planning" bureau where we send the money into community with plans and wait to see what happens?	1	2.27%
Improve manager training	1	2.27%
Improved systems integration	1	2.27%
increase competency of and trust in non-mangement level staff and lower level management staff so that bottlenecks in decision making at upper management are improved	1	2.27%
Increasing cohesion across teams	1	2.27%
Internal training on equity to build a workforce that attends to equity in all facets of work	1	2.27%
less risk aversion	1	2.27%
Livability	1	2.27%
make sure that changes are known throughout the bureau. i.e. forms	1	2.27%
more tightly written and managed workplans	1	2.27%
Offer education classes for first time home buyers	1	2.27%
Presentations by nonprofits at all staff meetings	1	2.27%
professional training for employees	1	2.27%
Program evaluation should be regularized and prioritized	1	2.27%
Provide support services to keep people stable	1	2.27%
Reduce redundancy in work functions	1	2.27%
Reduce the volume of contracts	1	2.27%
Refine budget development and monitoring process so that there is more synergy between the three divisions	1	2.27%
Resource development	1	2.27%
Shoring up the internal budget tracking process	1	2.27%
standard measures	1	2.27%
sticking to those priorities	1	2.27%
Stop talking and start doing	1	2.27%
Streamline Business Processes	1	2.27%
treating all staff equally whether they were former BHCD or PDC	1	2.27%

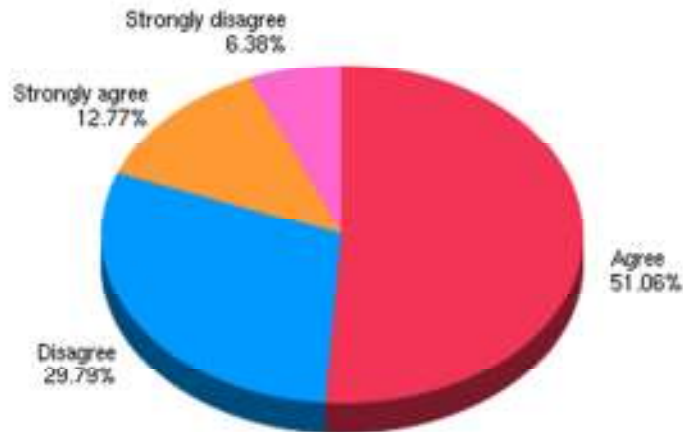
**6c. 3)**

Item	Count	Percentage
A bottom up focus with executive team listening to ideas from line staff	1	2.70%
a clear cut process and K:drive system	1	2.70%
Accuracy	1	2.70%
Asset management analysis to inform better investments	1	2.70%
Better collaboration with partners	1	2.70%
Change culture as a team and not individuals	1	2.70%
Clarify expected outcomes for contractors and prepare to hold them accountable	1	2.70%
Clarify staff roles	1	2.70%
Clear Dashboard for all PHB and more detailed dashboard for individual program areas for monitoring and change decision making	1	2.70%
Clearly articulating the role of the policy/planning team	1	2.70%
Collaboration with other agencies - public and private	1	2.70%
common reporting	1	2.70%
contine to tighten process to develop budget and new contracts	1	2.70%
demotions of many former PDC staff lead to low morale	1	2.70%
Determining how we will define and communitie who we are and our successes to external stakeholders.	1	2.70%



Develop a plan to sustain, grow and better leverage our resources	1	2.70%
Develop meaningful outcome measures	1	2.70%
Do things better less mistakes	1	2.70%
Each individual needs to evaluate and streamline their job as possible.	1	2.70%
Equity for employees to encourage maximum performance in a stressful environment	1	2.70%
Final business processes in place	1	2.70%
Have management get back in touch with staff, with better communication on day to day work processes not just big picture issues (not everything can be mandatory)	1	2.70%
Improve business systems and internal coordination - desilo PHB and orient all toward the whole	1	2.70%
Improvement of internal processes	1	2.70%
improving customer service	1	2.70%
increased outputs	1	2.70%
Management decision making is viewed as non-transparent when it comes to internal decisions. Take off the cloak of secrecy regarding decision making.	1	2.70%
More clear defined tele and video conferencing	1	2.70%
Not have so many staff have the same competencies i.e. Amanda	1	2.70%
Partner w/ State and Federal agencies	1	2.70%
Prioritization, resource development	1	2.70%
Project Management	1	2.70%
Provide more KNAC	1	2.70%
Public Relations	1	2.70%
stomp out smoke before it's a fire	1	2.70%
Streamline	1	2.70%
Very carefully (and continuously) assess where additional bureaucratic process adds to vs. detracts from our ability to work efficiently. Particularlry where trade-offs of decreased efficiency for some staff result in increased efficiency for the Bureau as a whole, help to clearly articulate those trade-offs to all and involve staff in process development.	1	2.70%

**7. The business processes and data systems I currently use help me perform my daily duties.**



Item	Count	Percent %
Agree	24	51.06%
Disagree	14	29.79%
Strongly agree	6	12.77%
Strongly disagree	3	6.38%

**8. Is there data being collected that is no longer useful?**



Item	Count	Percent %
No	31	65.96%
Yes	16	34.04%

**9. What type of information and data do you need from PHB's data and business systems in order to perform your job duties?**

Item	No real need	Some need	Regular need	Essential	Total
Budget Information	4.3% 2	34.0% 16	21.3% 10	40.4% 19	47
Accounting and Loan Servicing Information	19.1% 9	27.7% 13	31.9% 15	21.3% 10	47
Program Outcome Information	6.4% 3	27.7% 13	27.7% 13	38.3% 18	47
Compliance Information	12.8% 6	27.7% 13	27.7% 13	31.9% 15	47
Community needs data	14.9% 7	38.3% 18	14.9% 7	31.9% 15	47
Asset Management information	14.9% 7	44.7% 21	12.8% 6	27.7% 13	47
Contract information	17.0% 8	34.0% 16	21.3% 10	27.7% 13	47
Other	61.7% 29	8.5% 4	8.5% 4	21.3% 10	47
Average %	18.9%	30.3%	20.7%	30.1%	376.0

**10. If you checked**

Item	Count	Percent %
N/A	2	10.53%
All data relating to programs	1	5.26%
All of the data listed is important - in moderation.	1	5.26%
Any outside communication that gives the main phone line as a reference. It would be great to know what the public is inquiring about when they call for more information.	1	5.26%
Comparison to market performance	1	5.26%
Comprehensive set of policies and objectives and scorecard of how we are doing with the range of policies	1	5.26%

and objectives defined historically (e.g. Central City No Net Loss)		
Customer service	1	5.26%
data broken down by race, gender, familial status	1	5.26%
Define budget: Bureau area or Project? both are critical. Program Outcomes? are they clearly defined?	1	5.26%
GIS	1	5.26%
Inspection results, pictures	1	5.26%
Nothing else	1	5.26%
other data needed is typically contracted out i.e. rent comparisons, appraisals,	1	5.26%
Program plans for yearly setup in IDIS (e.g., action plan)	1	5.26%
Project Financial information	1	5.26%
Regional American Community Survey and Census data	1	5.26%
tracking permits and transfers of title	1	5.26%
who lives in housing we finance	1	5.26%

**11. Below are some key characteristics of a successful organizational culture. How well is PHB doing based on these key characteristics?**

Item	Very poor	Needs improvement	Competent	Very good	Excellent	Total
Innovation and risk taking	4.3% 2	43.5% 20	43.5% 20	8.7% 4		46
Attention to detail	2.2% 1	41.3% 19	43.5% 20	10.9% 5	2.2% 1	46
Outcome orientation	2.2% 1	52.2% 24	26.1% 12	19.6% 9		46
People orientation	8.7% 4	34.8% 16	32.6% 15	23.9% 11		46
Team orientation	2.2% 1	39.1% 18	43.5% 20	15.2% 7		46
Aggressiveness	6.5% 3	30.4% 14	58.7% 27	4.3% 2		46
Stability	8.7% 4	41.3% 19	39.1% 18	10.9% 5		46
Opportunities for advancement	21.7% 10	45.7% 21	32.6% 15			46
Mission alignment	2.2% 1	50.0% 23	37.0% 17	10.9% 5		46
Strong internal communication	6.5% 3	65.2% 30	13.0% 6	15.2% 7		46
Strong external communication	6.5% 3	39.1% 18	43.5% 20	10.9% 5		46
Average %	6.5%	43.9%	37.5%	11.9%	0.2%	506.0

**12. How satisfied are you in how PHB serves the following constituents and customers?**

Item	Very dissatisfied	Dissatisfied	Satisfied	Very satisfied	Total
PHB Staff	6.5% 3	32.6% 15	58.7% 27	2.2% 1	46
Borrowers and contractors		26.1% 12	69.6% 32	4.3% 2	46
Consumers of the housing and services PHB funds		30.4% 14	56.5% 26	13.0% 6	46
Political stakeholders like elected officials		13.0% 6	63.0% 29	23.9% 11	46
Portland residents and taxpayers	6.5% 3	30.4% 14	58.7% 27	4.3% 2	46
Average %	2.6%	26.5%	61.3%	9.6%	230.0

**13. How well is PHB currently doing in the following key customer service areas?**

Item	Very poor	Needs improvement	Competent	Very good	Excellent	Total
Clear program guidelines	2.2% 1	50.0% 23	43.5% 20	4.3% 2		46
Good response times		30.4% 14	45.7% 21	21.7% 10	2.2% 1	46
Capacity to anticipate problems and offer solutions	2.2% 1	34.8% 16	52.2% 24	10.9% 5		46
Cultural competency	2.2% 1	34.8% 16	45.7% 21	13.0% 6	4.3% 2	46
Regular evaluation and public accountability	2.2% 1	39.1% 18	45.7% 21	13.0% 6		46
Reliable data	2.2% 1	52.2% 24	32.6% 15	13.0% 6		46
Efficient use and allocation of resources		52.2% 24	32.6% 15	13.0% 6	2.2% 1	46
Involvement and transparency in decision-making	8.7% 4	54.3% 25	28.3% 13	8.7% 4		46
Technical assistance and capacity-building	2.2% 1	39.1% 18	50.0% 23	6.5% 3	2.2% 1	46
Average %	2.4%	43.0%	41.8%	11.6%	1.2%	414.0

**14. What staff training or professional development opportunities would be helpful to you?**

**14a. 1)**

Item	Count	Percentage
n/a	3	6.52%
Excel	2	4.35%
Management	2	4.35%
Ability to attend national conferences that focus on emerging best practices (travel restrictions are stifling our ability to stay ahead of the curve)	1	2.17%
affordable housing finance professional development	1	2.17%
Annual training/conferences	1	2.17%
answered above	1	2.17%
attend National policy conferences	1	2.17%
Career ladders	1	2.17%
Compliance Training for staff	1	2.17%
conferences	1	2.17%
Continued training, as available, of compliance requirements	1	2.17%
Contract monitoring and compliance	1	2.17%
cross training	1	2.17%
Cross training in program work	1	2.17%
Develop Mission, define programs that deliver to Mission, define program thresholds, define what is "success" to each. Result, standard outcomes and reports to measure success by. they work together, provide "road map" and talking points.	1	2.17%
expanded HMIS training not just software but also best practices	1	2.17%
General team building	1	2.17%
Housing policy	1	2.17%
How to honor differences but get everyone on same mission page	1	2.17%
lending	1	2.17%
Loan service accounting	1	2.17%
Local budget law	1	2.17%
Managerial and budgetary support for professional development	1	2.17%
Meditation	1	2.17%

More Reporting tools	1	2.17%
NA	1	2.17%
National community development trends	1	2.17%
OMB circular regs	1	2.17%
Ongoing sustainable update training	1	2.17%
Performance Base Measurements	1	2.17%
project management course	1	2.17%
Same as earlier question #12	1	2.17%
selection process of rfps, nofas, etc.	1	2.17%
ServicePoint	1	2.17%
technology training	1	2.17%
There is some assistance and capacity building that we are not doing for the community in terms of making connections with the construction tra	1	2.17%
This is redundant	1	2.17%
Understanding the role of PHB programs	1	2.17%
urban planning	1	2.17%
Visio	1	2.17%
yearly conferences	1	2.17%

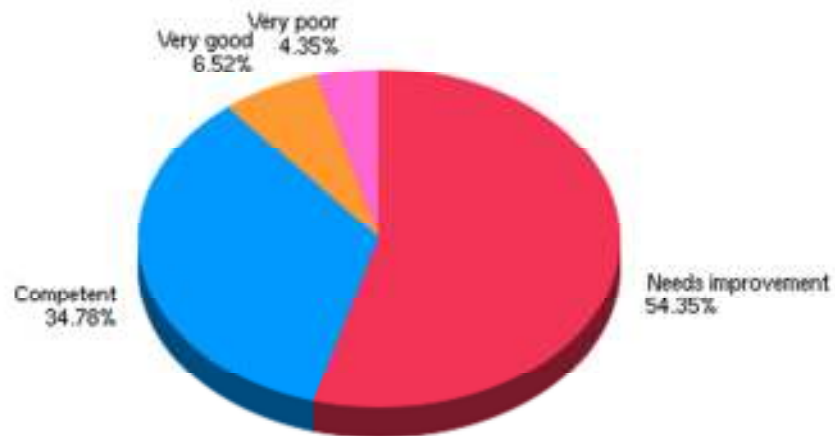
**14b. 2)**

Item	Count	Percentage
Advance Excel	1	3.45%
Advance Word	1	3.45%
city council items... what goes what doesn't	1	3.45%
Clear advancement paths	1	3.45%
Customer Service Systems Development	1	3.45%
developing useful outcomes	1	3.45%
development finance	1	3.45%
Each staff person should have an individual development plan	1	3.45%
equity/diversity	1	3.45%
Evaluating/assess budgets and invoices (allowable expenses, city requirements, what to look for in cost allocation plans, etc.)	1	3.45%
Federal grants financial management	1	3.45%
Finance	1	3.45%
Leading organizations	1	3.45%
management training	1	3.45%
More connections with communities of color	1	3.45%
More work on messaging.	1	3.45%
National addressing homelessness trends	1	3.45%
New software(s) as introduced	1	3.45%
Ongoing updates to maintain certifications and licensing	1	3.45%
other data base applications	1	3.45%
Sequel Server	1	3.45%
Software	1	3.45%
Structured finance	1	3.45%
Subrecipient monitoring "shadowing"	1	3.45%
Team building with team and whole agency	1	3.45%
to question	1	3.45%
Training opportunities	1	3.45%
training that provides a degree	1	3.45%
trainings in our work areas	1	3.45%

**14c. 3)**

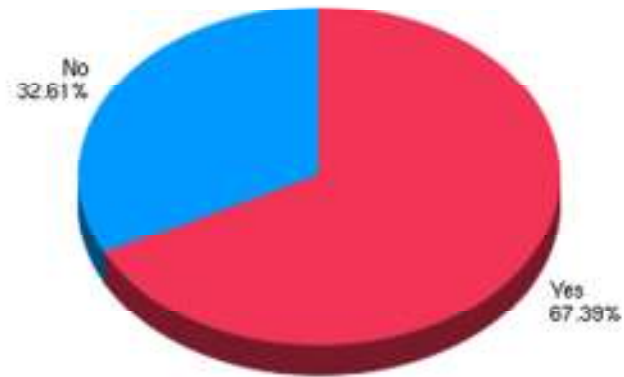
Item	Count	Percentage
A PHB retreat to go deeper with S Plan implementation when completed.	1	6.25%
alternate reporting tools	1	6.25%
cross training	1	6.25%
Cultural Competency	1	6.25%
Educational brown bags	1	6.25%
evaluating program performance	1	6.25%
Mechanics of housing development finance	1	6.25%
number 12.	1	6.25%
Ongoing program training in areas pertinent to my assigned duties and field of experience.	1	6.25%
public speaking (how to be more persuasive and effective)	1	6.25%
real estate development	1	6.25%
SAP specialized training	1	6.25%
Securities	1	6.25%
Senor staff needs to empower and lead lower level staff but not micro manage day to day work	1	6.25%
Team Building for an Organization that is production and outcome focused	1	6.25%
Workflow training	1	6.25%

**15. How well is PHB doing in internal (cross-functional) communications?**



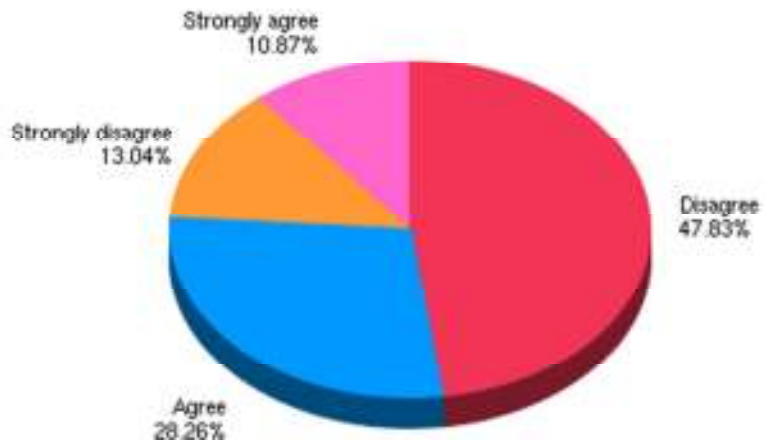
Item	Count	Percent %
Needs improvement	25	54.35%
Competent	16	34.78%
Very good	3	6.52%
Very poor	2	4.35%

**16. Do these processes need to be improved?**



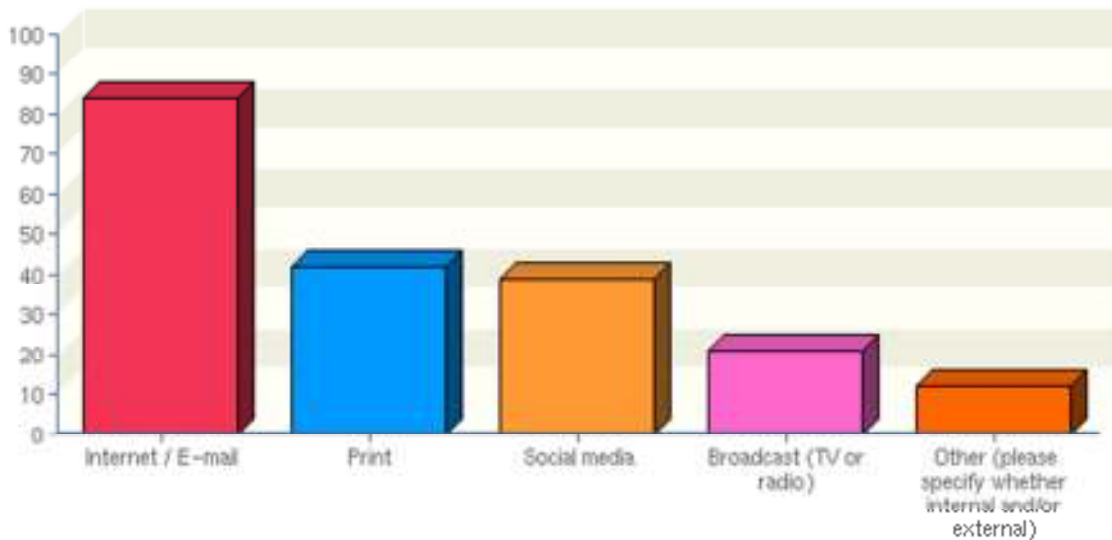
Item	Count	Percent %
Yes	31	67.39%
No	15	32.61%

**17. Should PHB devote more of its resources (personnel, equipment, time, money and/or something else) to implement public relations/marketing communication activities?**



Item	Count	Percent %
Disagree	22	47.83%
Agree	13	28.26%
Strongly disagree	6	13.04%
Strongly agree	5	10.87%

**18. Which media venues indicated below should PHB use to communicate to internal and external stakeholders. Check all that apply.**



Item	Count	Percent %
Internet / E-mail	84	182.61%
Print	42	91.3%
Social media	39	84.78%
Broadcast (TV or radio)	21	45.65%
Other (please specify whether internal and/or external)	12	26.04%
Others: Other (please specify whether internal and/or external)		
Community events with consistent messaging	1	2.17%
Community forums	1	2.17%
community gatherings, fairs, churches, clubs, interest groups	1	2.17%
Face to face meetings	1	2.17%
I have no preference	1	2.17%
in-person relationship building	1	2.17%
mailings to specific stakeholders.	1	2.17%
More person-to-person internal communication. The media flavor of the week is more attuned to external communication than internal communication.	1	2.17%
Newsletters and Meetings	1	2.17%
participation in housing-oriented fairs, conferences, events - information booths	1	2.17%
print media	1	2.17%
Video	1	2.17%

**Appendix 2: How would you concisely describe the most important outcomes for the people of Portland of your program or work area?**

Open Text Responses:
increased supply and availability of affordable housing
We help Portlanders purchase and maintain a home of their own.
Housing for the population
To provide timely and valuable data to inform PHB programmatic decision. In addition to collect data for compliance reporting of various funding streams.
Better policies to align with what Portlanders need in housing. Though we need to work on some of the outdated policies.



stable, affordable housing for people with low income

Getting them information that they require or to the staff member or agency that can best answer their concerns.

Very significant. Our monitoring, tracking and evaluation allows us to proactively maintain compliance to funding sources and Program thresholds/Guidelines. Allows or facilitates quick and easy retrieval of files/data for audits (via our systems). Our monitoring validates Borrowers/Project compliance or identifies situations that need assistance to avoid Out-of-compliance.

We provide policy guidance which directs how resources are allocated and spent

Placements of homeless households into permanent housing, number of affordable and permanent supportive housing units preserved or developed; housing retention; access to affordable housing options.

This is a pretty confusing question. I think what you're asking for is: "Within your program or work area, what are the most important community-level outcomes of your work?" If that's what you mean, here's my reply (If I've got the question wrong, you're welcome to revise and resubmit.):

There are two primary goals to our work:

1. Decrease the numbers of people experiencing homelessness, particularly chronic homelessness.
2. For those experiencing homelessness, decrease the duration of homelessness and recitivism to homelessness.

Each of those goals has multiple measurable outcomes (including increasing permanent housing placement and retention for people experiecing homelessssness; increasing number of permanent supportive housing units preserved or newly built; and increasing numbers of people at risk of becoming homelessness for whom homelessness is prevented).

- 1) Alignment of resources with identified need.
- 2) Relalignment of strategies based on evaluation of results.
- 3) Listening to the community
- 4) Communication to our customers, funders, and larger community about identified needs and solutions
- 5) Shaping public opinion to support resource development based on a needs analysis

Rational, easily understood and easily implemented policies and plans related to the provision of housing for all of Portland.

Thoughtfull direct the expenditure of public funds across the continuum of housing needs for lower income people in Portland.

Develop housing, improve peoples' standard of living, create construction jobs, improve economic competitiveness and environmental sustainability.

Stewardship: Demonstrates fiscal responsibility. Uses resources wisely and looks for ways to achieve most value at least cost to public. As applicable encourages/supports sustainable development practices.

Document the range of housing needs in Portland and plan and develop resources, policies and strategies to address them.

Helping Portlanders less fortunate

I play a bit role in

Provision of housing that is not currently provided by the market.

Helping people get into, and keep, stable housing

The HMIS database gives the community an extremely low-cost system to collect data, highlight their successes and meet their contractual obligations. This allows funding to continue flowing into housing programs.

Data demonstrates value received for dollars spent.

fiscal accountability  
prudent use of tax payers dollars  
timely disbursements for project implementaton

As an administrative section we support all the programs that PHB provides.

Efficient, effective, and compliant use of citizen tax dollars, whether those dollars derive from federal, state, or local sources.

Acquire and secure fundings

Distribute fundings

Monitor fundings

In compliance with funders

Acquire and secure available fundings

Distribute fundings to highly effctive organizations with good records programs.

Monitor fundings/programs outcomes and ouputs.

In compliance with funders.

HUD (HOME & CDBG) funds continue to be allocated to PHB for use in funding construction/rehab of rental housing portfolio.

I work multiple programs providing indirect financial assistance primarily for home ownership (some rental.) The desired outcomes of the programs are to incent new construction of homes affordable to families within city limits and to help home buyers be able to afford their first home.

Getting the word out about PHB investments in the community. Ensuring that we're reaching diverse stakeholders.
I lend a hand to those who produce outcomes for the people of Portland.
N/A We report the outcomes for other programs
We are actually out to these peoples homes doing work to keep them in a safe and decent housing. They love us and what we do.
Successful, affordable housing meeting the 60 year affordability with quality details, durability, and liveability met through positive design and green critiera.
Responsible and efficient use of City resources to accomplish PHB goals.
Ensuring that citizen's tax dollars are spent in an efficient, effective, and compliant manner whether they be federal, state, or local tax dollars.
Helping households access and maintain homeownership.
Maintaining the contract/invoice process so that non-profits, agencies & others can continue to provide services to the community.
new construction of affordable housing; affordable home ownership;increased density(not everyone considers this a good thing, but it is in alignment with the City's goals); indirect assistance with low-income housing both through reduced building costs as well as property taxes.
Preserving affordable housing units or building new units.
Providing financing for development of community facilities that provided services to people with low or moderate income.
The most important outcome would be for the citizens of Portland be fully informed with accurate and relevant information of the production completed by the PHB.
hmis system is the primary client level data system, open environment hmis system, timely and accurate data, consistent definitions through out the community, standard measures, common reporting.
HOME OWNERSHIP! Upkeep of homes for the lower income folks.
That we provide our assistance responsibly and equally to all applicants and that we make timely decisions regarding approvals. We also need to deliver our assistance in a timely manner and hold our borrowers to the terms and conditions of their agreements.
?
[A] Lean, effective and compliant management of financial resources. [B] High-quality reporting and analysis that provides bureau (et al.) with meaningful, actionable information. [C] Efficient operations that promote "getting money out on the street" without sacrificing the controls that exist (or should exist) to ensure conscientious stewardship of public resources.
Efficient use and preservation of public investment in housing
Providing accurate and reliable accounting and finance information
We aren't at a place where we can clearly communicate the most important outcomes for PHB. What I hope to be able to communicate in the short term is how much funding we received in FY09/10 and how many outputs/outcomes that we purchased with the funding we received.
Legislative affairs: more resources for affordable housing and ending homelessness; more 'tools' for our affordable housing toolbox; more legal protection for tenants; progressive policies that promote 'communities of opportunity' for people who are currently marooned in poverty.
Public involvement: better solutions to complex social problems as a result of partnerships between government and the public, for profit, and non-profit communities. Greater public confidence in PHB's ability to invest resources. Greater public confidence in government. Government that is more responsive to the public's authentic needs.

**Appendix 3: Assume you are speaking to a class of Middle School students (7th and 8th graders) about PHB. In one sentence, how would you answer the question:**

Open Text Responses:
make resources available to expand availabilty of affordable housing in Portland
We make sure people in Portland can get a decent place to call home by investing in local affordable housing partners and programs.
Provides housing across the spectrum of citizens
We provide housing opportunities for people who could not afford it otherwise.
We work hard to create equal opportunities for the people in Portland so they have homes to call their own.
Develops housing and provides opportunities for low income people to obtain housing while also helping homeless people get back on their feet by giving them shelter, services and hopefully eventually a permanent home.
Strive to create affordable living situations.
The Portland Housing Center provides leadership for the city in building affordable housing, ending homelessness and

creating affordable homeownership opportunities

The Portland Housing Bureau helps people in our city to find safe homes that they can afford to live in and stay in for as long as they like.

The Portland Housing Bureau leads the work of other public partners (like the federal, state, and county governments) and private sector partners (like developers, social service agencies, and home buyers) to make sure that safe, decent housing is available to everyone in our community, regardless of their income level, their race or ethnicity, or their health status.

PHB provides funding, creates plans, implements policy and influences public decision making for the development and preservation of affordable housing.

The Portland Housing Bureau manages money being granted to improve access to quality affordable housing. Management includes deciding which issues and projects are most important and effective to invest in and making sure the money is spent as promised. PHB makes choices based on conversations with the community, analysis of facts, and equity principles including sharing environmental, economic and social benefits and burdens.

Another sentence

The Portland Housing Bureau promotes housing and community development that serves the evolving housing needs of Portlanders based on principles of equity and sustainability.

The Portland Bureau of Planning and Sustainability (BPS) promotes integrated land use planning and development based on sustainability principles and practices. BPS also develops and implements policies and programs that provide environmental, economic and social benefits to residents, businesses and government, which strengthen Portland's position as an international model of sustainable practices and commerce.

We make loans and grants to community groups and businesses that build apartments and houses that working people, or people without much income can afford.

Helps Portlander's access quality housing that they can afford.

Our job is to ensure a sustainable supply of affordable housing to the citizens of Portland.

We invest public funding in programs help meet the housing needs in Portland, including the operation of homeless shelters, programs that help people find, secure and keep housing and also in programs that actually build new units and help people buy their first home.

Provide housing related services to Portland families that are underserved.

PHB creates housing that the private sector doesn't.

PHB sets policies and funds programs that helps low-income Portlanders find and keep safe, stable housing that they can afford.

Help people get into housing they can afford and then support them to ensure they are successful in maintaining their housing.

Portland Housing Bureau works to satisfy one of the basic needs everyone has: the need for safe, comfortable, affordable housing.

Provides housing opportunities for low income people.

PHB provides affordable housing and homeless services to the people of Portland.

The Portland Housing Bureau works with local nonprofits and developers to provide housing for low-income or homeless people in our city.

We deliver housing opportunities for those in the community who struggle to find those opportunities on their own.

Help low income people to have a roof over their heads.

We help low income people to have a roof over their heads.

PHB provides money to build housing, and access to services to help people and families with very low incomes find safe housing.

PHB helps families in Portland have a safe place to live in order to have more opportunities in life.

We invest public money in programs that help people with little money rent or buy a home at a price they can afford.

PHB receives money from our federal government and dispenses it to organizations that provide opportunities and resources to our low-income and homeless citizens.

We have many programs that help very low to moderate income people get decent housing.

Provides affordable quality housing for a broad spectrum of the city population including families, the disabled, the homeless, the senior citizens, and those not able to qualify for a secure environment without assistance.

Believe we need to focus on this answer. currently believe we are delivery a Mixed MESSAGE. It is not clearly defined at this moment. Would like it to be: "we provide a BROAD housing solutions/opportunities for the Citizens/families of Portland".

Make decent and affordable housing available to all city residents.

We provide housing opportunities to those who may be unable to find those opportunities with their own resources.

Through parnterships and direct funding, PHB supports programs that help low-income households identify, access, and maintain housing they can afford to pay for.

We are a conduit of funds to organizations that provide services to those on the street, affordable housing to those in need and services to keep folks stable.

Assists the range of poor to average income Portland residents with housing needs.
Influence and finance the development of healthy communities so that all individuals have the opportunity to live in the neighborhood of their choice.
PHB is responsible for spending taxpayer money to make homes more affordable to low income people.
We find affordable ways for families to buy a home of their own.
PHB is a diverse city bureau that ...
The Portland Housing Bureau assists developers and non-profits with financial assistance in order to preserve and build affordable rental and for sale housing.
I don't really have a good handle on what we thing PHB does.
The PHB provides funding and monitors it use to ensure that Portland's housing needs are met.
Financial assistant in the form of low or no interest loans and grants to low income family in the Portland Metro area.
"Not all families can afford to rent or buy a home without help. The Portland Housing Bureau helps families rent or buy homes when they can't afford it by themselves."
PHB helps to make Portland a city of opportunity by making sure that everyone has a good home in a safe and stable neighborhood. We know what works, and we have to do a lot more of it.

**Appendix 3: PHB has committed to reflecting its Core Values in how it conducts business with its customers. Name 2-3 core values that you would like to be associated with PHB.**

1)	2)	3)
integrity	hard work	creativity
Service	Respect	Integrity
Respect	Consistency	Reliability
honesty	equity	
honesty	Transparency	Responsibility
equity	Livability	Accuracy
equity	Stewardship	creativity
equity	Affordability	Opportunity
equity	Stewardship	
equity	Collaboration	Needs-based planning
equity	Innovation	
equity	Accountability	Transparency
equity	Transparency	
Opportunity	Affordability	
Broad, all inclusive housing solutions	Responsive solutions to the market conditions and needs	
Transparent	Responsive	Outcome focused
Responsive	Proactive	Collaborative
Integrity (in strategic planning and programming)	Accountability (of funds and outcomes)	Effectiveness (directing resources where they make the greatest impact for those most in need)
Housing gives people an opportunity to build better lives. To succeed you need a place to call home.	No one should be without a safe, stable place to call home.	The public sector, especially at a local level, has the ability and the obligation to creatively address the housing needs of everyone in the community, especially where those needs are not met by the private sector.
Clearly defined community participation process	Fairness	Commitment to equity
Social equity	integrity	
Accountability	Partnership	equity
fairness/equity	Accountability	openness/transparency
Efficiency	Stewardship	Leadership
Efficiency	Responsibility	Capability
Accountability in delivery and performance by PHB	Accountability in delivery and performance by funding recipients of PHB	
Innovation	Professionalism	Ability to deliver
accountable	relevant	Responsive

Responsible	Meaningful	Compliant
Collaborative	Accessible	
conscientious	dedicated	data-driven
Transparency	Accountability	equity
Transparency	Efficiency	innovativeness
Accountability	Stewardship	
Accountability	Stewardship	Efficiency
Helping to plan and build for Portland's future housing needs	PHB is working to make housing accessible to all of Portland's very low income communities	
Be respectful	Do not judge	deliver in a timely manner
Sustainable well designed housing	Affordable secure and community supported environments	Meeting needs for families, single occupants, and many others with low and middle incomes.
Effectiveness	Focus	Transparency
Focus	Humility	Decisiveness
Affordable Housing	Supportive Services	Assistance
sustainable diverse communities	provide equitable opportunities	customer friendly
Honesty and integrity	fiscal responsibility	
knowledgable	compassionate	creative
consistent definitions through out the community	standard measures	common reporting
Equality	Responsible	Consistant
Effective		
sustainable	efficient	equitable
Housing	Grants	Loans

**Appendix 5: Like many other agencies, PHB is facing the potential reduction in resources that could affect program funding and staffing levels over the next few years. What are your top ideas for creating efficiencies, making reductions, consolidating programs, or moving resources from lower priorities to higher priorities? Be bold and think creatively - no ideas are wrong and no savings too small.**

Open Text Responses:

Layoff 25% of staff. Eliminate use of external consultants

I think it is important for the Bureau to try to use what resources are available in a more efficient manner. In addition, there are a lot of great potential funding streams available outside of our traditional avenues. Portland has a well respected reputation that could be used to leverage into some of these new sources.

Do we really need an entire department focused on policy for an agency that is really not intended to suppose to be making policy? It is my understanding that federal funding prohibits lobbying and City Council is suppose to be making policy. In my opinion we should focus our energies on implementing housing related policies and investing in affordable housing.

Consolidate some loan servicing functions.

We should start with our culture of spending internally -- we seem to buy a lot of unnecessary supplies, or expensive versions. Reduce paper use. Go back in time and not buy the TV that's in the break room that I think has been turned on twice. I also think we should change our focus from reducing resources to finding out how to increase our resources.

Don't know.

1) more direct delivery vs out sourcing

1. Define our clear mission and priorities as a bureau, with clarity on the priority groups/individuals that our funds and programs are intended to benefit.
2. Set goals on what we want to accomplish and our intended outcomes and impact.
3. Assess how well current bureau programs are meeting these goals, and analyze what our funds "buy" us in terms of outcomes and traction towards meeting our goals.
4. Based on this analysis, we can determine which programs/activities to continue, which to potentially change/merge with others, or which areas require the elimination, expansion or addition of new programs/approaches to achieve our bureau goals.

Given that the bureau is newly formed, it is important that staff have more opportunities in the next several months to get more informed and educated about the work of other programs in the bureau, and how each department/program is

connected to the whole. This could occur formally (like continuing the staff presentations), or informally with programs/depts just talking more together about what they do.

1. When possible under regulatory requirements, streamline data collection processes (both internal and external), and focus capacity on analyzing existing data sources to assist in guiding policy decisions. We currently spend a lot of time and effort collecting data (often to meet regulatory requirements), but we have very little capacity to analyze those data to help us make smarter decisions.
2. Get rid of AMANDA, and replace it with a contract data system that can actually provide us with useful summaries of how we're using our money (links to categories of spending that make sense in the real world) and what we're getting for it (links to projected and actual outcomes). For instance, in our current subrecipient contractor letters, we collect great information on FTE that our contracts fund, other funds that our contracts leverage, and projected outcomes associated with each contract, but we have no centralized way to collect that data to guide internal decision making or to inform policy makers.
3. Develop smarter distribution of clerical work related to subrecipient contract development and reporting. For example, we currently have contract managers entering information into AMANDA that is readily available in existing contract documents. Why have higher classifications doing what amounts to basic data entry?
4. Once we've developed clearer sense of bureau strategic vision and mission, begin to delegate decision-making authority to program managers. If we're not willing to do that, scale back and redirect the focus of that level of management. There is little purpose in maintaining middle management if most (if not all) decisions must be made by executive team.
5. Better employ the professional knowledge and skills of program coordinators and other subject matter experts to assist in agency-level decision making. The current decision-making processes often exclude this knowledge at all stages, fostering comparatively poorer decisions that have to be revised later or adjusted significantly in order to operationalize in the real world.
6. Similarly don't discount external stakeholder involvement up-front in decision-making processes. The extra time up front often yields better results and fewer (time and resource consuming) political messes to mop up later.
7. Don't sacrifice training and travel just because it's an easy target for reductions. Attending national conferences actually helps us stay abreast of federal priorities, ahead of national trends, and informed of innovative strategies that can assist our work here.
8. At least within the Ending Homelessness scope of work, don't divorce the strategic planning and policy development roles from the service delivery roles. It creates duplication of effort, and divorces ground-level reality from policy and planning work.

This conversation is best had in the context of management offering its analysis of the current budget constraints.

We should explore new resource development opportunities. We should consolidate our home repair efforts into solely contracting with outside partners to do the work (as we did with DPAL). Make plans of action to develop or sell properties PHB owns (would take property management costs of the books).

Make our HDF underwriting and documentation process less onerous. Get someone to pay us for labor-intensive work on "indirect" programs.

Shift some HOME from rent assistance towards building more units.

Stop paying PDC to conduct wage monitoring.

Complete portfolio analysis and streamline data collection needs. Consider making more outright grants and fewer complex loans that have to be monitored for collection of excess cash flow.

Fire low-performing staff. Eliminate operating support for nonprofits. Provide top-loss loan guarantees to catalyze private lending.

What is the potential scope of the reduction? Asking such an open ended question puts us in an awkward position.

I would reduce the number of directors at an executive level. There isn't the need for three directors for an agency this size. I would create efficiency by having Maileen work in the Policy section and reduce the department by 1-2 FTE. Currently there are two manager, plus a director.

I would create savings by combining reporting functions. There appears to be many contract managers for contracts, when some of those functions can be combined.

The bureau needs to think more creatively on doing market rate development and generating new resources.

- Invest in innovative software to automate the functions performed.
- Become a paperless office (scan nearly everything).
- In addition to grants, focus on financial assistance products that have a high likelihood of repayment to ensure a steady flow of revolving funds (med-low credit risk borrowers, workforce housing assistance, market rate housing, landlord assistance products, etc.)

Step 1 = Evaluation and assessment - what's working and what isn't? What is inefficient?

Step 2 = Reduce or eliminate what isn't working or working efficiently

(1) Ask for volunteer non-paid vacations, with health benefits maintained.

(2) Require 2 week agency-wide vacations with health benefits maintained.

The first that comes to mind is to bring back internally the functions that are being outsourced to various non-profits. Much of the inefficiency of the programs are created by the inefficient and poorly run programs being administered by non-profits we fund. Those funds and programs should be brought in house.

Other resources of the agency are being bleed off to support the Commissions office and overhead functions that are not being actually performed by external staff.



By bring the money back we will be financially healthier and be to manage the financial accountability we have with our federal and state funding sources.

Need to completely examine what every single person and program does and what they/it are contributing to the Bureau's highest value outputs. Simply stated: this is a bureaucracy, there's waste and in the face of budget reductions, waste should be eliminated. Typically what happens in these kind of situations is that there are favorites or that managers are afraid to look at the truth of what their group does and who they have on their team. And some managers might need to be the ones to go. It'll take strong and ethical leadership to do this work. I think that's an open question. And how the reductions are implemented will be crucial to the forward success of the bureau. Badly done reductions will do nothing but further hurt productivity.

- eliminate programs that do not fit within new strategic plan/mission
- increased management of staff and external expectations to keep focus on most critical tasks
- consolidate functions (ex, have contract specialists do AMANDA set ups rather than contract managers)

Way to big picture for me. I cannot answer this.

Think carefully about the cost of holding meetings. Keep staff informed and involved, but eliminate unnecessary meetings.

business process improvements across functional areas  
Assess staff workloads and realign them towards highest priorities  
Work hard to not further thin the soup with regard to services provided

Use more funding for foreclosure prevention, taking it from homeownership programs. Work more closely with consortium partners to determine cost savings strategies.

We need to stop trying to be all things to all people. Influence needs focus to be effective.

Is there any cash flow hiding in our loan portfolio? Our staffing is lean in loan servicing, but I wonder if a third-party agency might be able to identify financial opportunities. Perhaps such an agency would take on this task 100% at risk (i.e., paid only upon bringing money in the door).

No comments

Leverage the strength of community organizations, volunteer-driven groups and others who are doing frontline work in addressing housing needs.

PHB cannot focus on so broad an agenda that most programs get band-aid funding. Many funding sources have specific restrictions to their use. 1) City's Ending Homelessness Initiative needs re-assessment and redesign. Assuming there may be other questions later that will allow elaboration of the program problems, I will say that a program SHOULD exist with stringent restrictions to allow assistance to those individuals and families who really want to work to end their homelessness - meeting goals and benchmarks. Let the private and non-profit entities help the homeless. 2) Statewide streamlined compliance reporting is in process but there are many obstacles created by various government and private lending barriers (working through these). There has never been a steady funding source for monitoring the regulatory restrictions placed on the housing portfolio. Sharing technology and results will eventually conserve resources. 3) Policy & Planning is performed at every local jurisdiction and should be merged at a higher level to plan for the Portland region's future. All action plans (regardless of source) are processed through City Council for approval. 4) Stop farming out ongoing tasks that can be completed in-house (assuming staffing is appropriate.) Contracts should only be used for one-time projects where expertise is needed that may not exist within a bureau. 5) Stop "open/revolving door" policy with regard to borrowers returning for more and more funds due to poor project and money management skills. 6) Consolidate filing systems - electronic files to conserve paper, space, supplies and cabinets, and make more accessible to more staff.

We should:

Look for additional resources, including fee income on the programs like other government entities do (i.e. DMV).  
Invest in systems which allow work to be done more effectively including reporting, processing, records management, etc.  
Quit throwing money at non-profits who do not have success at helping those in the community they serve.  
For all programs - "lay down the law," by balancing the politics of giving out money for projects/programs (on all levels) without getting repaid or getting the data and results required by running things more like a business and less based on "entitlement."

Stop funding non-profits that aren't performing.

Ask employees to start putting their e-mails into a folder on their H drive and stop wasting so much paper.

Assure that our sustainable and design criteria is being met during and after construction. Operations and Maintenance criteria is crucial to limit restructures which take away funding for other new projects and rehabs not currently receiving funding from PHB.

Limit the rehab funding to projects which serve multiple tenants, have sound management practices, and are dispersed throughout the Portland Community.

Improve and expand our use of technology to increase efficiency.

We have to break the cycle of trying to fix every housing need in the City. There is enough external political pressure to do so without it being part of our internal drivers. There are not the resources to fix everything.

It's time to stop shipping \$2.8 million of CDBG resources out for economic opportunity. It's not our mission. Housing is.

We need to sharpen the focus on delivery - where can our money be the most effective? That will mean that worthy efforts would no longer receive our funding. We have to be willing to do that.

CDCs need to stand on their own feet. We need to be a source of financing for them, not a source of funding.

I would like to see us focus energy from first time homebuyers to keeping folks in their housing, whether it be rental or

owned.
Check in with fellow agencies/CDCs/etc to see if we are duplicating studies and work. Share work and results. work with them where possible to come up with shared goals and surveys/data collection.
Reduce the level of direct service the Bureau provides, evaluate staff workloads--how equitably distributed are they? Reduce PHB involvement in development, increase role of contract specialists to include Amanda data entry. Decide how much the Bureau and the populations it serves are truly served by an influence agenda and staff accordingly.
Many improvements have already been implemented with the new leadership and organization, but continued work on the following is still needed: Standardized funding availability announcements. Standardized loan summaries presented for approval. Much much stronger asset management. Simplified approval process for smaller loans or restructures.
Create a resource development or grant writing capacity.
consistent definitions through out the community, standard measures, common reporting.
i think that it is very important that all positions are reviewed as to the amount of time and work load in each. i see that there are people with time on their hands and people that are absolutely burried. there needs to be more equity in work load even if it means crosstraining / helping other departments. Knowledge is power.
n/a
n/a
Not sure about consolidating programs, but getting the imaging system set up and running will save money on paper costs and staff time not having to copies items and being able to find documents in one place instead of having to look in several different places for what you need. Also being able to generate workable reports from a system instead of having so much staff time spent preparing separate reports or doing data input into several different reports that provide the same information just in a different format.
1. rebalance housing delivery/existing portfolio to create a self generating income stream that recycles funding and cross subsidizes deeply targeted units. 2. Reduce affordability period to 30 years (long term rehab costs can't be met). 3. PLPAs to bring in new funding sources. 4. Fees for all funding
Look for new and improve business processes and funding allocation efficiency
Continue to assess all divisions, teams and functions for optimal performance. Collapse all MCC/LTE and SDC funtions onto one team and staff appropriately. Assess rental and homeownership development pipeline and ensure that staffing reflects pipeline. Sell single family loan portfolio immediately. Ensure that the PHB culture is very focused on performance measures and timeliness.
I would look at PSH programs to assess whether JOIN's lower cost approach is effective with the populations served by higher cost providers, e.g. Human Solutions.
I would leverage more staffing help from the County for the 10-Year Plan and required federal planning processes.

**Appendix 6: If yes, what opportunities for alignment do you see?**

Open Text Responses:
Any city wide program that is duplicated by multiple agencies; homebuyer education and counseling; short term rental assistance; downpayment assistance programs; cdc consolidation; small grant home repair programs; foreclosure prevention programs;
The County DCHS and HAP provide direct contracts with nonprofit providers to perform rent assistance and homeless services to families, youth and adults experiencing homelessness. PHB/EHI currently works very collaboratively with these agencies in several areas, however, there are other opportunities for improved coordination and efficiencies.
These aren't new, by any means, but: 1. The delivery infrastructure associated with homeownership is covered well by the private sector, especially for households with incomes that will support homeownership. Where households with income levels that will support homeownership are not served by the private market (for example, through lack of marketing to or current or past discrimination against specific subpopulations), we should focus on influencing rather than delivering. Where household incomes will not support homeownership, we shouldn't focus on homeownership (though we should look to influence on economic opportunity). 2. The historic Resolution A/B division of responsibility for different subpopulations of people experiencing homelessness between the City and Multnomah County results in multiple instances in which we are both contracting with the same providers for similar activities, but for different populations (families vs. adults or chronically homeless). We see the overlap most frequently in emerging strategies for ending homelessness (like homelessness prevention and rapid rehousing). In other cases, we're literally contracting general funds to each other to then subcontract to direct service providers. We've worked to improve alignment (the collaboration around the STRA program at HAP is a great example), but not sure why you need housing staff (and associated program management) at PHB _and_ DCHS, versus getting rid of the population split and consolidating.



3. I don't know the housing policy world well enough to know whether (or where) there's overlap there, but it would be interesting to take a closer look how much weight we need to carry in this arena vs. how much Oregon ON, Coalition for a Liveable Future, HAP, and others should take on.

Opportunities for alignment will only be effective if PHB positions itself to be the leader, and identifier of mutual benefits. Currently there are overlaps between BES, BPS, PDC and the County in terms of a desire for similar outcomes but different resources. Examples include green building, exemptions, lead safety, air quality, location policies, communication technology, linkages to social services. None of these outcomes can be delivered by PHB alone. The investment in coordination and influence can reap enormous leverage of existing resource for mutual outcomes among the bureaus. Without leadership from the Mayor or the County our Bureau will have to identify where collaboration needs to take place. Without this leadership by PHB the alternative will be to face the fact that there are outcomes that we want but we are not the right agency to deliver the program or we do not have the money therefore we need to remove programs or desired outcomes.

Need to clarify workforce housing opportunities with PDC.  
Planning and Sustainability and the Clean Energy Works project

Better alignment with HAP = I have a concern that we are paying Millions to bridge a 3-6 month wait for folks to get on Section 8 or Pub Hsg

Better alignment between homeless services and rental housing/asset management - I think we are paying too much \$ to private LLs and aligning too many services to pvt market units while PSH units are suffering from lack of services.

PDC does housing still. Why? Makes no sense. Further, PDC and PHB now have duplicate functions in some areas like finance, accounting, loan servicing.

HAP - Rent Assistance

Let the County do what the County does, and let them fund it.

1) Referenced above - Policy & Planning for regional Portland activities. 2) Inspections of Portland housing market - central database that will allow results (standard format) to be posted and available for evaluation and use by many entities. 3) Construction Coordinators review project billing submissions and approve for payment. They visit sites to assure compliance with PHB/City Green building requirements and codes. In addition, each project has developers, primary contractors, subcontractors, architects, etc. Is there a possibility for consolidating this position with another (i.e., inspections).

Joint funding with foundations, corporate philanthropists and nonprofit funders, especially in addressing homelessness needs.

Maybe not by name but in theory, the county and many non-profits exist to eliminate and serve homeless and low income families and many of them lack capacity to effectively reach the communities they seek to serve.

Work together to help our partners be successful.

Multnomah County Weatherization and health programs. Energy Trust and the State Energy Department. We need to create more direct connections between these programs which duplicate service, areas of coverage, and duplicate / similar additional paperwork.

overlapping "Planning" responsibilities: consider combining: City, Metro, County Housing combine into one central area for the Region to reduce admin expenses

We need to let the County do what they do, and let them pay for it.

Multnomah County has a few tax exemptions programs serving different sections of the City's residents. work with them to align definitions used in statute and code so we all share the same understanding and meanings.

Better collaboration with County Sun Programs and HAP, HOPWA duplicates work performed by Multnomah County.

I'm not sure it is that there is so much duplication, but it seems like the different agencies of the city are silo-ed and there should be better coordination if the city is building strong, healthy and sustainable communities.

HAP

MultCo and the City each fund some of the same agencies and services. I am not an expert in the details, but might we achieve some efficiencies via a clearer coordination and/or delineation?

Housing funds are being used to make up for social services cutbacks directly and indirectly.  
Redirecting funding to housing broader needs is needed.

Multnomah county for ending homelessness.  
OHCS for rental development and streamlining reporting.  
PDC for non-set aside housing development.  
BPS for planning and policy.

**Appendix 6: We want to ensure that PHB is a high performing agency. Over the next year, what do you think should be PHB's top priorities for self-improvement (list up to three)?**

1)	2)	3)
secure funding resources	delegation of authority down to organization	
Equity	Livability	Accuracy

Develop a clear and compelling business model that builds on our strengths and provides direction to how we want to do business	Establish an Affordable Housing Advisory Committee to provide public insight into our decision making process	Develop a plan to sustain, grow and better leverage our resources
recognizing hard work of staff	treating all staff equally whether they were former BHCD or PDC	demotions of many former PDC staff lead to low morale
Strong mission, strategic plan	Cross-train employees	Better collaboration with partners
No more lay-off	Stop talking and start doing	Do things better less mistakes
Develop broad message for housing	eliminate Narrow focus, spending all dollars in one area	
Define and solidify PSH definition and inventory.	Determine a clear and inspiring mission, vision and goals that is responsive to the housing needs of all Portlanders.	Determining how we will define and communicate who we are and our successes to external stakeholders.
Streamline subrecipient contract development, tracking, reporting, and monitoring.	Identify and/or develop staff capacity for data analysis for improved reporting, program evaluation, and decision-making.	Very carefully (and continuously) assess where additional bureaucratic process adds to vs. detracts from our ability to work efficiently. Particularly where trade-offs of decreased efficiency for some staff result in increased efficiency for the Bureau as
Inter-departmental communication	Branding, outreach, marketing	Prioritization, resource development
Solid communications and public involvement plan	Resource development	Asset management analysis to inform better investments
Asset management and HDF alignment	Reduce the volume of contracts	Clarify expected outcomes for contractors and prepare to hold them accountable
More (noncatastrophic) mistakes	less risk aversion	increased outputs
Greater empowerment and involvement of staff	Improve manager training	Clarify staff roles
Streamline Processes	Dedicate resources necessary for successful Loan Portfolio Management	Partner w/ State and Federal agencies
Back to basics - housing is our core competency	Program evaluation should be regularized and prioritized	Improve business systems and internal coordination - desilo PHB and orient all toward the whole
strengthen relationship with Oregon ON	increase competency of and trust in non-management level staff and lower level management staff so that bottlenecks in decision making at upper management are improved	Not have so many staff have the same competencies i.e. Amanda
Discontinue outsourcing		
Bring more funding in the door, e.g. housing bond, other resource development activities	Continue providing services directly to people, but people of a wider income spectrum	Management decision making is viewed as non-transparent when it comes to internal decisions. Take off the cloak of secrecy regarding decision making.
better communication about rational behind decisions	more tightly written and managed workplans	continue to tighten process to develop budget and new contracts
Define what a high performing agency is. # served, housing created, what is success define it.	Improved systems integration	Change culture as a team and not individuals
Streamline work		
Understanding of each others activities	Employee growth & development	Improvement of internal processes
Cross functional training	Presentations by nonprofits at all staff meetings	A bottom up focus with executive team listening to ideas from line staff
Internal Communications	Streamline Business Processes	Project Management
Process improvement	Increasing cohesion across teams	
Staff training	Consolidated and up to date systems	Final business processes in place
Pinpoint top two programs; then refine processes and cut bureaucracy (red tape) to achieve building needed housing	Identify mantra: 1) Are we an "action" bureau where we do the work; or 2) Are we a "planning" bureau where we send the money into community with	Each individual needs to evaluate and streamline their job as possible.

units.	plans and wait to see what happens?	
Defined Mission	Development of Staff and Managers	Collaboration with other agencies - public and private
Streamline operations	Reduce redundancy in work functions	
Improve the portfolio.		
Be present at all of the neighborhood fairs	Offer education classes for first time home buyers	
Quality and healthy work environment	Electronic Documentation and filing which meets the new city council policy and city auditors' guidelines.	More clear defined tele and video conferencing
Efficiency	Accuracy	Public Relations
Prioritize	Focus	Streamline
Focus funding to those at risk of losing housing	Provide support services to keep people stable	Provide more KNAC
clarity over priorities	sticking to those priorities	stomp out smoke before it's a fire
Contract compliance and consistency	Shoring up the internal budget tracking process	Clearly articulating the role of the policy/planning team
equity/diversity education	professional training for employees	improving customer service
Determine the long term goals	Identify best use of employees	
consistent definitions through out the community	standard measures	common reporting
knowledge of the work of each department	make sure that changes are known throughout the bureau. i.e. forms	a clear cut process and K:drive system
less bureaucracy		
Create workable processes that work for all, that are as streamlined as possible (not so many hands in the pot)	enlist the staff that now the work to help set up the process	Have management get back in touch with staff, with better communication on day to day work processes not just big picture issues (not everything can be mandatory)
Sustainable Practices	Change from the past	Equity for employees to encourage maximum performance in a stressful environment
More standardize business process	Better tracking for loans portfolio	
More delegation from Exec team to other managers: end the bottleneck	Internal training on equity to build a workforce that attends to equity in all facets of work	Develop meaningful outcome measures
Crisp and Clear Customer Service Expectations	Refine budget development and monitoring process so that there is more synergy between the three divisions	Clear Dashboard for all PHB and more detailed dashboard for individual program areas for monitoring and change decision making

**Appendix 8: How could PHB improve the current business process and data systems to better support your daily work?**

Open Text Responses:
Improvements to Mitas are needed
Try to bring together the many disparate systems that track data.
Perhaps business opps staff could do a tip of the month at each all staff meeting.
not as much replication of similar data in a million different reports and databases
There are still staff who do not understand all of the business processes, so the first thing should be to get everyone on the same page (even simple things like how to ask for vacation time or paying bills). Some staff need to work on being a little more self-sufficient as well. There are still staff who do not know how to reserve a conference room or laptop. Little things like this make a big difference when everyone is on the same page.
More communication. Everyone needs to be on the same page.
Continued communication and training from finance and data team on process and protocol (e.g. contract process). There has been great improvement in the 10-11 process (compared to 09-10). Involving the contract managers in reviewing/providing feedback on processes has been great. We should continue building upon and incorporating this type of collaboration between staff depts in the months ahead.
I need a place where I can go to know what data we have, how to use the date, the phases of projects, what are we working on, when does it go to investment committee, what happened, when does it go to PDC or City Council, what happened, how much was invested, where are the files, who is the project manager.. I need the data to be easy to query

and consistent so I am not coming up with information different from my co-workers. We need to be educated about what data we have and how it can be used.

Some of this is out of our control, but:

1. Invest in data systems that are intuitive and user-friendly. Where that's not possible (e.g. legacy systems are required, new systems are prohibitively expensive, no intuitive systems are available, etc), consolidate interface with the system to as few employees as possible to decrease the associated training and TA burden. AMANDA is clearest example of this for me.
2. Continue development of Employee Tab to develop better web-based administrative process and tracking. If we can route documents electronically, that's better than printing and routing hard copy.
3. Work with contract management staff to identify automated and ad hoc reporting capacity for contract fiscal management via SAP. It's silly that I'm manually tracking contract spending performance when all of the data necessary to do so resides in SAP.
4. Make the contract budget amendment process a two-way street. Specifically, if Exec Team and/or Fiscal team chooses to alter contract award amounts, require notice to (and ideally input from) contract management staff.
5. Develop a better (ideally electronic) means of tracking leave requests.
6. Develop clearer intra-Bureau email protocols and expectations to a) decrease internal email volume, and b) clarify which emails require review vs. response.
7. If possible, move away from hard-copy contract files toward consolidated electronic files.

Produce a quick reference chart showing who does what on the business/data teams and where to go with questions.  
Better organize/control the K drive folders.

Would love to know how the loan portfolio is performing.  
Would love to see budget-to-actual in summary form.  
Hungry for the dashboard

Simplify the WBS Element coding for timesheets.

There is too much data that isn't integrated and is redundant. Unclear information regarding Outcomes and the progress of the bureau in effecting change with outcomes.

Implement a new bureau-wide system by investing in the necessary training and development costs to set it up correctly. Make sure it's a SQL system. Whether it's Mitas, HDS, or another contender - the key is making sure it is set up so all users have access to the information they need, and management has access to key reports/indicators.

Budget more accessible and functionally organized

Policies accessible in one-stop place internally and externally (both internal and HR-type policies AND external priorities and policies)

Dashboard built and operational so outcomes and expenditures are clear

I think it is too early in the PHB organizational life to make this determination. We are still figuring out the systems and processes. So far, I don't have anything specific, but not all processes have been implemented yet.

Not aware of any.

SAP for timesheets is ridiculous. Way too much detail. Garbage in, garbage out. It's not the way people think of their work or track their time.

Why is there both and AMANDA AND IDIS? Seems silly.

Mitas continues to be an inefficient band aid solution. Not a well designed piece of software.

-Replace AMANDA

-Have budget and SAP (and staff trained) so we easily see what fiscal staff are seeing, and get our own info

-I would really like to have contract specialist (almost more like procurement specialist) like OHCS has divided their contracting and program/contract management work

I think that for the most part, PHB business practices and data systems are aligned with my work.

More standard outcome measures across our programs. Better separation between HUD stuff and our general funds. It feels like we want to talk about programs funded by federal dollars the same as our local programs. What is wrong with talking about federal programs separately from our general funds. We are supporting those programs NOT running them.

Enhanced version of Mitas

Streamlined disbursements

Project managers assigned to development projects throughout life cycle

Increased communication in the Spring about project status impacting the budget

Get a way of uploading program information to the HUD database IDIS

Disbursements of funds are financial process, not a program delivery process. Loan and grant disbursements need to follow the same process as sub-recipient payments, no matter what system they originate in. There needs to be a project manager for projects, much as there is a contract manager for contracts. The buck needs to stop somewhere.

Avoid double entries.

Consolidates data systems.

New Bureau needs to consolidate number of programs being used, all project data should be available to all users for reporting on existing, trending, planning, underwriting. (i.e., Mitas, IDIS, Amanda, SAP, Microsoft Access, etc?)

More on this
The database I work in does not have the capacity to track and report out the work done. I need something more than Access, and I need the time and staff support to convert it to something else. We also have been understaffed for years as the programs have been ignored in the midst of constant reorganization and other priorities. There needs to be more accountability handed to the staff who do the work and to not have such a "top down" model.
Meeting the city councils' and city auditors' electronic document control policy.
currently believe they are a work-in-progress. Need to fully incorporate Asset Management/Loan Servicing into the life cycle of loan and Bureau process/procedures. Compliance monitoring is significant to assure ongoing Borrower and project compliance. If they are in compliance the Bureau is in compliance.
Upgrade data systems to take advantage of current technologies and minimize duplication of effort.
We need to get good data into our primary systems at a meaningful level without duplication and without bogging down existing business processes.
We need to streamline disbursement processes - there doesn't seem to be a reason to have different disbursement processes just because a second system is in play.
Continue the standardization of contracts.
Use tools that are available rather than creating new tools - need to understand the current tools available.
Continue to define them better.
n/a
n/a
n/a
more complete database options. more technical assistance in creating links to other data sources such as CGIS.
Use MITAS more efficiently to reduce the amount of one-off tracking systems used in the HDF team.
Standardize and improve the excel underwriting model for HDF team.
Bring more control of these processes and systems into PHB
consistent definitions through out the community, standard measures, common reporting.
there should be clear cut process and forms (if necessary) for each process.
Processes need to be established that work for the type of work being done. Systems need to work together, without so much duplicate data entry and reports should be consolidated where possible.
[1] Provide program staff access to SAP budgetary info. The info is there. Staff should be able to access and understand it with only a small amount of training. [2] Loop in finance & accounting when project financial decisions are being discussed or made. We want to help and not be a barrier, but we don't always know what's in the works. [3] Step back and take stock of the new work flowing through finance & accounting (i.e., loan/grant commitments & disbursements). Develop and document processes (including forms, job aids, etc.) that will facilitate smooth processing for bus ops and program staff.
1. Replace Mitas with user friendly database that provides more current information. 2. Sharing of information.
Look into possible ways to consolidate into one system
Assessment of all data systems and eliminate redundancy. Require all contractors to use Service Point/HMIS to report on outcomes.
Much of this work is in progress now. I am a great admirer of our fiscal team.

**Appendix 9: What types of business or IT training would you benefit from?**

Open Text Responses:
GPS
I am interested in anything.
I need more training and regular reminders on how to best work within the city system.
project management
I'd like to know more about how SAP works.
Mitas.
ServicePoint training; AMANDA training; contract monitoring requirements; finance/invoice trainings.
Publishing, Web site publishing,
Basic training in public budgeting and accounting practices.
Can't think of any.
Use of shared files
None, well, maybe an etiquette class.
None
If we are going to proceed with Mitas, further setup and training will be necessary.

If another system is chosen, the same applies.

Annual training/conferences that relate to asset management and loan servicing are also very helpful.

Excel training for more advanced use

I don't really want to be an IT expert. I would like some more training in CDBG and HOME regulations and other affordable housing matters.

management

?

?

more detailed CDBG reg and monitoring training (hands on training)

Business Objects/Crystal Reports/SQL

Excel

Housing Development Finance

Lending

Credit markets

I had IDIS training last year, thank you

I have been approved to have an accounting course. Thank you again.

We need to finish developing who does what before deciding on training needs.

SAP

MITAS

MITAS read-only access.

Primary training needs are related to regulatory requirements and statute changes for federally-funded projects. As new funding sources are introduced, it will be important to learn compliance requirements of those funds. IT training would be limited to programs used to track all project and inspection data (Mitas, or other?)

Housing

management training, maybe Excel

database, SQL, systems planning

Sharepoint

Lot's, I'm sure - but we can't afford it.

Visio

N/A

N/A

N/A

Additional Access classes. Full CGIS class (through PSU?). Additional data collection classes (something like CGIS?). Real Estate law, general class.

More MITAS training

Opportunities to take classes at PSU in the Urban Planning Department

SQL,

this is a long list; expanded HMIS training not just software but also best practices; other data base applications; alternate reporting tools; VPN, SQL, ACCESS...

a mandatory department by department training of the filing system on the K:drive.

Depends on business or system changes.

Training for Mitas replacement.

Loan service, loan accounting practice and asset management

None at this time.

Outlook

More training on how to involve low-income people

## Appendix 10: If yes, what are examples of such data?

### Open Text Responses:

Yes and no, the problem is that there is a lot of data that is collected that does not appear to be useful. But, it is collected for administrative purposes that is dictated by our outside funders. So, even though this doesn't seem useful, it needs to be done to satisfy our reporting obligations.

I am not aware of any unnecessary data being collected. I think we need to do a better job of mining the data we do have though to better tell our story and show our outcomes.

N/A.
I do not know. I do not know what we collect.
Almost everything I enter into AMANDA, especially for general fund contracts.
The huge binder I saw once from Todd Kelly had much redundancy
2000 Census
The programs collect data that does not align across programs: housing tenure, income, etc. - more uniformity and less randomness
The timesheet information requested of TIF funded staff is a waste of staff time. You will not get good information back as it takes too much time to do correctly. Garbage in = garbage out.
This may take some time to get a handle on...
None that I know of. I don't work much with other data systems than the financial ones and IDIS.
We need to avoid the trap of collecting data for data's sake. There is a staff cost to collecting data, so management needs to be thoughtful about how many staff resources they want to divert to data collection.
Not of which I'm aware.
In fact, federal requirements are requiring collection of more data than is currently being tracked.
we collect data, however, need to have authorization for IT staff to reconstruction/build efficient database to house historic compliance data so that we can USE and report out historic, meaningful facts on our "affordable housing portfolio". Data is there, just need to build the database structure and standard reports for staff useage. Also, need ability to pull adhoc queries.
Rather than identify specific data, I would point out that there is a cost to the collection of data. We don't have the staff to collect data for data's sake. We get enough external demands for that type of data. There is a point at which it stops being cost effect to track minutiae, and we need to be mindful of that
n/a
n/a
Its no so much the info is not useful, it is more that is not used to guide our planning and decisions.
probably; anything that is colleccted just for the sake of collection or because it might be interesting. if it is not part of the "consistent definitions through out the community, standard measures, common reporting."
more like what is in the K:drive that can be moved to a different folder or deleted all together.
Multiple data collection points are people focused instead of systems focused
Not aware of all data being collected.
There are multiple reports that track the stages of projects under development/restructures.
Much of the data that is collected by AM/LS is not easily reportable and isn't used by HDF staff for underwriting and informing lending guidelines.

**Appendix 11: What additional data do you need that is not being captured by the current systems?**

Open Text Responses:
current asset management information on property operations
There are a lot of data sets available that would be highly useful such as the loan delinquency rate from the Mortgage Bankers Association. The problem from my perspective is that we will often times be thrown questions from the commissioners office that do not necessarily fall into categories that we have been researching.
Customer service feedback
certain data that currently isn't being captured in MITAS such as different types of loan funding
I can't think of anything right now. It seems like we have a lot of data, we just need a good way to illustrate what it says.
Not sure.
ServicePoint currently collects information on race/ethnicity; however we have not been analyzing data specific to this factor. In 10-11, addition data/IT staff support will be needed to assist with in setting up and maintaining this analysis as part of our regular reporting format.
we always need ways to update census data
1. Data collected in contractor letters: Full program budget vs. PHB-funded budget (by source); contracted FTE funded by PHB; Output/outcome goals by contract
2. Quarterly performance related to output/outcome goals is generally (but not always) collected in ServicePoint, but reports are generated by the contractors and submitted to PHB in an unconsolidated manner that makes it difficult to track (on a system-wide level) individual contract performance vs. goals.
Regular communication with BPS/BDS on building permits or other useful housing data. Maybe incorporate Uma Krishnan into PHB.
dashboard



Economic and job impact.
N/A
N/A
N/A
N/A
Project Financial data. It's currently being maintained in individual spreadsheets. They should be available to the underwriting, workout, and asset management staff from a single system. This would have made the recent project completed by HDC much easier, quicker and at a lower cost. This is key to future portfolio analysis.
See above
It is too soon to know how TIF information will be available.
Nothing I am aware of
None
None
Can we easily see, slice and dice info on people served, outcomes ,etc???
Contractors meeting their goals
Nothing at this time
Uploading ability to IDIS from the contract management system.
Data on the data.
No comments
Some info is being captured but not in a "shareable" system. Access DB is capturing race/ethnicity, disability Y/N (but no specifics - mental / physical). Still need: 1) population served; 2) services (level); 3) Project ratings: a) compliance performance based on criteria; b) management rating; c) inspection results
Solid demographic data about communities of color served by our programs
We need to track our compliance data more efficiently and get consistent data about ownership and permit status (GIS) for the properties we are tracking in order to do more regular audits of the programs.
?
Believe the data is there, it is just getting it out? Standard Loan Payment reports -- monthly revenue; aging reports. Borrower Loan Portfolio reports, Monthly Loan Production Report, Monthly Bureau Investment Committee approval/status Report, Project Status Reports (pipeline report indicating what staff is currently working on and what stage of the process the project is current in -- for all departements.
Transaction logging
None.
none I can think of
I'm not sure of what is actually being captured. Maybe it would be helpful to know that.
economic indicators
N/A to my position, as my job is to collect the data from the external service providers.
can't think of anything right now.
any feedback relating to existing loan portfolio would be useful and is not available.
systems seem to capture what we need, but there is alot of duplicate entry, systems don't talk to each other and too many individual manual reports are created. Need to determine if systems can provide needed reports.
During the budget cycle, we need to provide performance measure data. The better we track data that is useful and high-integrity, the better this portion of the budget process will go.
Comparison of City subsidized housing to market housing
Asset management information, scan loan documentation, more reporting capability within the system
Timely budget to actual financial reports.
Reports that will communicate the overall performance of the loan portfolio including reports on specific borrowers.
Longitudinal data about effectiveness of housing assistance on life trajectory.
Data about impact of housing stability on schools, employment, etc.

**Appendix 12: If you expressed dissatisfaction in question 17, what improvements do you suggest?**

Open Text Responses:
Overall, it is more a reflection of the more top down approach currently being implemented.
cross training and career advancement for staff, we shouldn't have to fear we are going to be laid off every other day
I think we need to begin surveying our direct customer service as well as the service provided by the partners we fund. We then need to regularly review and work to improve our customer satisfaction results.



We're not very innovative at this time, but I think we're moving toward it. Staff are still feeling pretty unstable, and it seems there is almost no opportunity for advancement at this time. Finally, we cannot really have mission alignment when we don't have a mission.

Get those contracts to contractors in a reasonable time.

Send out communications that are clear and won't panick the consumers.

Cater fairly to all races.

My real response is somewhere between dissatisfied and satisfied. In talking with, listening to, and observing several staff from former PDC and BHCD depts, there seems to be overwhelming fatigue and uncertainty (about the future, people's roles, how they can contribute, and expectations/new processes that need to be abided by in the new bureau). This don't foster a supportive, mission-driven environment in which people tend to thrive and work at their optimum level. That said, there have been several positive things PHB has achieved in gradually merging staff and programs, and moving towards a more unified bureau. The completion of the strategic plan will be a great benefit, as long as it is done in a way that fully engages staff participation so that there is buy-in in its creation and implementation. Multiple focus groups and interviews with program-level staff will be an important part in letting staff hear their voices, concerns and ideas in shaping the new bureau.

1. We need clearer opportunities for staff involvement in agency decision-making processes.

2. Executive team needs to tap the content expertise of staff and contractors, particularly where executive team members lack that content expertise (e.g. ending homelessness).

3. Executive team needs to better communicate (to staff and contractors) not just decisions, but the broader rationale behind the decisions.

4. We have become increasingly responsive to our elected officials (especially Nick). This is good. However, it seems that it has been at the cost of being responsive to staff and contractors (who often have a better grasp of community needs and effective strategies to address those needs).

5. The consolidation of decision making authority within the exec team, the lack of staff access to inform that decision making process, and the lack of clarity regarding how/why exec team makes the decisions it does has been frustrating. In the first year of transition to PHB, Margaret emphasized a desire for transparency and accountability and projected a value that PHB's employees are our greatest resource. The consolidation of decision making authority has undermined both goals, with the exec team coming across as insular, inaccessible, and giving lip service to wanting employee feedback without actively seeking it or using it when it's provided.

6. Our external communication strategy and protocols are very unclear. I don't understand what we're communicating to stakeholders, how we decide what we communicate to stakeholders, or what our goals are in communicating with stakeholders.

7. In general, I'm noting a trend in the formation of PHB toward increasing heirarchy and bureaucratic process, and away from responsiveness, flexibility, and transparency.

We do not have a public image yet therefore it is not possible to say the public understands or is satisfied with our service. The improvement is to be as well known as the Parks and Recreation or Tri-met. They both spend a lot of money on their marketing and branding campaigns.

None, until after the current strategic planning process has played out fully.

The bureau is run in a top down, somewhat elitist fashion. The management treats staff in a superficial fashion and takes very little time to engage staff in the decision making process other than providing input.

Even the nature of this survey to capture how we can improve our processes, do our business feels hollow because at the end of the day decisions will be made to appease external partners versus a true consensus that involves staff as well as external stakeholders

Develop career ladders and communicate with staff regarding merit increases (or lack thereof).

The issue has to do with not risking new ventures and an overall politically driven agenda to not challenge non-profit recipients of funding to actually perform to the requirement of the contract or compliance. The tail is wagging the dog.

Where to start? The culture here is marked by a lack of vision, a lack of risk taking, a lack of care for employees. This Bureau has been coming together for over a year and half. That's more than enough time to make headway in addressing these issues. I have seen very little commitment from management in regard to morale and culture. There's a well of resentment about the merger and how poorly it was handled. Improvements would include: getting employees their salary increases, restoring vacation benefits, getting real job descriptions that match what people actually do, not what's easy for city HR. On another tack: upper management has been pretty bad in communicating, communicating reasons for decision making. Example: why was NHP hacked so badly? Example: why do certain organizations get favorable treatment while others don't. On another tack: there's been no visible attempt to rationalize/bring together the two separate sides of the shop. Where is the compelling nexus about merging the two organizations? Still haven't seen it. Needs to be worked on collectively. At PDC there was a huge and emerging emphasis on team/group decision making whether it was with regard to culture, reorganization, or strategic direction. I've seen very little of that here. It's like there's a big blind spot here about including the whole staff in the direction and decisions about the agency.

I think PHB needs to be more true to its mission, less influenced (within realistic boundaries) by politics, complaining contractors and citizens when those groups ask for things that don't meet our mission

I would want consumers of housing and borrowers/contractors to be much higher priority than political people. Right now I feel that it's the opposite. I realize this may not be very feasible.

I assume you mean dissatisfaction in Q:18 - Both categories will be improved when PHB has a more defined mission and strategies concerning program priorities and implementation of plans. Communication will be a key goal in letting the

Portland residents and consumers of the PHB products know how they will access the available products.

Question 17 or 18?  
 Staff are weary and need to be able to focus on doing the work of the bureau.  
 Programs are complicated and it seems like we are always communicating out to consumers, borrowers, and contractors last minute because we don't have the capacity to communicate more efficiently.  
 We sway to the whims of elected officials too much.  
 Bottom line, we need to be more consistent (and thus fair) in how our programs are administered, who receives the benefits of the programs, and how we communicate things as well as holding our own bureau and the community more accountable. Overall, the bureau needs to be more proactive and innovative.  
 For instance, we hold meetings to ask for input, but the meetings are firstly poorly attended and secondly meaningless because they don't seem to affect how things are truly rolled out whether its due to a managerial or political influence/decision or due to the strings attached to federal money.  
 There are some very passionate, brilliant people working for PHB, but I don't see anybody who is happy coming to work right now....

More concise accountability. Greater inclusion in decisions and actions.

Need to be more responsive regarding contracting to the consumers of the housing and services PHB funds

Should have a category; " no opinion". again, forming new teams and communication channels. all have not been fully implimented. Believe we are or will get there.. just need time and support to allow all depts to be fully integrated. Also, have a CLEARLY defined Mission will provide FOCUS, until then.....? mixed bag.

See answers to 7, 11, 24, 25, and 31.

n/a

Share more information in a broader way. Do not rely on website notification.  
 administrative changes in programs should go through a broader review and/or be shared with a longer leadtime. changes have been catching builder/homeowners off guard!

The staff environment in some areas does not seem professional. I think that needs improvement.  
 I think there needs to be more appreciation of hard working staff.  
 I also think there needs to be more opportunities for professional improvement.

I think the word needs to get out to more of those whom we can help!

I think we need to stop jumping so high when an elected official says jump.

Not sure the best way to get my point across. It seems alot of focus has been given to the big picture and looking good, when the Bureau was being set up, but very little focus was given to how the work was going to get done (the new work being brought in and how that would mesh with the current work being done) and now we are having to scramble to deliver to our customers in a timely manner and having to try and get answers in a timely manner on how things are to be done. It is a really hard situation right now as ideally staff that know their jobs should be asked to assist in process set up but then they also must continue to deliver on time. Management being asked to set up processes do not always know the work and have a lot of mis-communication between themselves which in turn results in staff getting multiple directions from multiple managers or not always being told if things are added to their workload or even taken away from their workload until either project is due or they have invested time in working on the project.

Many staff believe their recommendations are not considered they are not being treated fairly.

We need a collective committment to crisp and clear customer service.

**Appendix 12: What staff training or professional development opportunities would be helpful to you?**

1)	2)	3)
affordable housing finance professional development		
More Reporting tools		
conferences	trainings in our work areas	
Managerial and budgetary support for professional development	Each staff person should have an individual development plan	Senor staff needs to empower and lead lower level staff but not micro manage day to day work
Career ladders	Training opportunities	Educational brown bags
Excel	Advance Word	
Excel	Sequel Server	
Contract monitoring and compliance	Evaluating/assess budgets and invoices (allowable expenses, city requirements, what to look for in cost allocation plans, etc.)	public speaking (how to be more persuasive and effective)
Ability to attend national conferences that focus on emerging best practices (travel restrictions are stifling our ability to stay ahead of the curve)		

There is some assistance and capacity building that we are not doing for the community in terms of making connections with the construction tra		
General team building	Clear advancement paths	
National community development trends	National addressing homelessness trends	
Meditation	Structured finance	Securities
Understanding the role of PHB programs	Leading organizations	Cultural Competency
Annual training/conferences		
How to honor differences but get everyone on same mission page	Team building with team and whole agency	A PHB retreat to go deeper with S Plan implementation when completed.
answered above		
Management	training that provides a degree	
Management	Finance	
OMB circular regs	developing useful outcomes	evaluating program performance
ServicePoint		
lending	development finance	
Cross training in program work	Subrecipient monitoring "shadowing"	SAP specialized training
Continued training, as available, of compliance requirements	New software(s) as introduced	
cross training	management training	
Housing policy	More connections with communities of color	
Ongoing sustainable update training	Ongoing updates to maintain certifications and licensing	Ongoing program training in areas pertinent to my assigned duties and field of experience.
NA		
technology training		
Develop Mission, define programs that deliver to Mission, define program thresholds, define what is "success" to each. Result, standard outcomes and reports to measure success by. they work together, provide "road map" and talking points.		
This is redundant	to question	number 12.
Visio	Software	Workflow training
Compliance Training for staff		
project management course		
urban planning	equity/diversity	real estate development
Same as earlier question #12		
expanded HMIS training not just software but also best practices	other data base applications	alternate reporting tools
selection process of rfps, nofas, etc.	city council items... what goes what doesn't	cross training
yearly conferences		
n/a		
n/a		
n/a		
Local budget law	Federal grants financial management	Mechanics of housing development finance
Loan service accounting	Advance Excel	
attend National policy conferences	More work on messaging.	
Performance Base Measurements	Customer Service Systems Development	Team Building for an Organization that is production and outcome focused

#### Appendix 14: How can PHB leadership and management provide enhanced support to your daily work?

Open Text Responses:
s
There needs to be a person who manages all the IT issues for the Bureau.
recognition of new job duties and workload
Senior managers need to create a clearer vision for staff and projects and then trust lower level staff to carry it out. We should attempt to
Clear priorities for work tasks; it would help if Margaret were more visible -- I rarely see her, and it's usually a fly-by "hi." More feedback on how work is going, and how it can be improved.
Not sure.
1. Provide clear direction (intented goals and measureable impacts) behind goals of the bureau, so that we (staff) fully understand the reason and desired impact so that we can effectively communicate it to our contractors and outside parties. For example, one area where additional clarity is needed is the equity agenda. Why has the bureau prioritized this, what are our goals, and how will be achieve it? These are important things for us to understand as staff so that we can be effective and accurate communicators of the bureau's mission to our outside partners. There are some instances that it feels like we put the cart before the horse, which leads to confusion with partners and internally with staff. 2. Regular communication (e.g. check-ins, mtgs) with our team about things related to/connected to our contracts and broader work in the community. 3. opportunities to share and partner more with other depts on areas that cross over to achieve more coordination and better outcomes.
Either delegate decision-making authority (within reasonable boundaries) down to program managers, or increase the accessibility of exec team members. I experience frequent delays in my work (which in turn erode my relationships with contractors) while I wait for exec team to be able to address decision points.
annually reaffirm policy attachments in loan documents to determine if we can do the monitoring, if the policy is still applicable, is the language still legally binding.
Increase frequency and amount of internal communication with staff.
They do plenty for me!
Eliminate all-staff massage emails. Trim dead wood (fear is a good motivator). Keep printer paper/envelope trays stocked at all times.
Provide a strategic framework for the bureau that is holistic and articulates the roles of staff and how we work together.
Articulate priorities
Let staff know as soon as possible what the priorities are for the bureua, which programs will be supported and what resulting reductions will occur as soon as possible. Provide those staff who are impacted as much time to transition to new agencies, bureaus and facilitate opportunities for staff to find work
Communicate decisions more effectively by including all involved.
Feedback up and down so we all know where we stand and how we are doing.
I find PHB leadership and management very supportive and appropriate as to my daily work. For obvious reasons, in the first 90 days of PHB workflow was not good. It is very good now, basically at the right level.
Provide support for difficult and sometimes politically charged decisions to include or exclude an outside perceived stakeholder.
See comment 19.
Have a better sense of what I do and must address on a daily basis
Training in ServicePoint, the software I use every day of my working life, ought to be a priority. It doesn't make sense that the ONLY person who is being sent to be trained in the new release of ServicePoint is a person who does ZERO training.
Help define the lanes we need to stay in. Shift the culture from innovative and cutting edge to an agency that handles it's business well and allocates resources effectively.
nothing at this time
Listen to ideas from staff. Communicate at interim points in decision-making process. Be timely in responses to questions or concerns.
Keep communication open and honest. Continue to solicit our input and ideas. Look forward to having a Strategic Plan that will more closely define what PHB will be offering to Portland - believe our goals are too broad and cannot be successful on so many fronts.
We need assistance moving forward on policy decisions and code changes to make the programs whole which haven't been done due to the transition and insufficient staffing.
Foster culture of information sharing.
More direct methods of access.
Precise job duties and responsibilities.

Opportunities to learn new assignment.
database creation to SQL for housing annual compliance data and creation of standard reports. This requires management to agree on standard program outcomes and to define program thresholds and define what "success:" is.
feedback; clear goals and plan for the future
Don't ask me to do work twice, unless it wasn't done right the first time.
Keep up what has been working, ie my supervisors are amazing.
Recognize how intense the staff workload is for many staff.
Additional staff or less expectations of delivery.
Better appreciation of staff.
Improved communication of planning decisions.
Provide more budget for professional improvement or conference attendance.
Supply clear direction on what is expected.
N/A
N/A
keep me informed. i don't want to hear anything through the grapevine. i.e. i was made aware of a check log. does the whole agency know of this check log. individual learning as a situation comes up is wrong. if there is a change we should be made aware of it both by staff meeting and email.
consistency, timeliness, less bureaucracy
I think we planned for the 7/1/10 transition well, but we need to continue to prioritize process improvement and standardization. Currently, I feel we're getting by and getting the work done as an organization. But we often don't have an agreed-upon "right way" to handle many common business scenarios. (E.g., competitive bidding, contract execution, project set-up, reservation of funds, loan/grant disbursements.) We're going to continue to spend too much of our scarce time resources on day-to-day business functions if we don't make the time investment to develop core process/policy infrastructure.
See response to #19
Inform PHB when recommendations from staff are incorporated
Clear directions / guideline and communication
I often feel out of the loop. I would appreciate mprovement to the flow of our internal communications. More warmth.
Show more trust and confidence in staff beyond Executive Team.
nothing at this time.

**Appendix 15: What internal communication challenges should PHB address?**

Open Text Responses:
Need to identify point contact for specific items. It seems we sometimes have multiple parties working on the same thing and no one is authorized to make a decision.
There is a general lack of understanding what teams do.
Being more transparent with decision making. We find out things at the last minute.
I think we need better communication about what the various teams are doing and working on.
Communication is pretty good, but often seems after-the-fact (i.e. after decisions have already been made, and there's no real explanation about why).
Front desk staff needs staff to answer their phones so that they don't have to look for folks when they have walk-ins. Call when they have an appointment and folks are left sitting because staff is out of the office. Put meetings and locations on their calendars.
Communication between leadership, management and program-level staff has improved significantly, but could use more improvement in terms of better understanding the reason behind decisions and the process that it took to get there.
1. Program managers may be aware of what's going on in other program areas, but that's definitely not getting back to staff level.
2. There is no clear communication between the work of the policy/planning side of the shop and the delivery side. I frequently see strategic planning and policy staff in meetings discussing elements of our team's work, but we've never been at the table for those conversations. Likewise, as we're planning our work on the delivery side, we've never involved strategic planning and policy staff. Seems like a significant disconnect.
All staff need more of a global look ahead at the work load of our counterparts, i.e. how many loans, how many legislative pieces, committee meetings.
It sounds like there is a lot of cross communication at the manager/exec level, but it's not filtering down to staff.
delivery teams and finance
Siloed thinking

There needs to be more team building. There is an undercurrent of us and them still. There is a feeling of loss among employees from PDC and BHCD as a result of the cultural change. More time needs to be devoted to tending to the change occurring at PHB.

More communication by leadership in team meetings and less reliance of all staff meetings as the mechanism for communication. More communication by Margaret via e-mail about the issues and direction of the bureau.

More competent management by Andy, Jacob with their teams on what is needed. Both do a lot of talking at people (Andy more so than Jacob) and less listening and problem solving.

While working on a particular project, some are kept in the loop while others are not.

Balancing folks desire to "know everything" with efficiency.

Communications with HDF underwriters is sometimes difficult.

Be frank about decisions based upon political pressure versus good business decisions.

How about communicating at all. Decisions are made in a black box and are only sporadically communicated to staff. Need to understand that staff is highly competent and highly motivated and should be an equal (if not greater) partner in decision making.

Rational behind decisions

Most cross program communications to see where partnering and efficiencies can occur

Good communication.

The focus on our own programs, instead of realizing all of the programs complement each other.

HDF information sharing

See 22. I feel that management is currently kind of oblique in its decision making from the staff's point of view.

There are still many employees not involved in brainstorming. Some are not asked or feel they are too work overloaded to entertain the idea of taking time to participate. Some may feel they do not have enough information to offer perceived valuable input. Others are not inclined to speak in front of groups.

There are still two different worlds existing here at PHB - a contracting world and a delivery system. These two things can exist together but cannot be forced to be the same as the other. They need to be understood by both but honestly, the management level is mostly former BHCD staff who do not have a clear understanding yet of what it means to directly deliver to the community.

NA

NA

Conferencing - tele and video.

formalize processes for making changes

management/staff need to understand why Asset Management Guidelines are significant. Understand that a regulatory agreement is different from a contract, each has its own compliance.

It's past time to lose whatever baggage came over from PDC. This merger is the opportunity to repair dysfunction, not perpetuate it.

Between construction managers, project managers and fiscal

Staff capacity in terms of lack of time for proactive communication.

I think we're doing pretty well.

Data collection and reporting.

Budgeting decisions.

Staff appreciation, acknowledge successes.

What is the expected budgetary shortfall expected that would precipitated layoffs next year?

I have no strong opinion on this

process'

N/A

Decisionmaking without communication is unhelpful

See response to #19

I think the communication between the finance & accounting team and program delivery teams could improve significantly. One way might be to meet regularly or to involve members of one team in routine meetings of the other team. But I think it more important to implement functional business processes that meet the needs of both 'sides' of the house. This will embed effective information-sharing into the process itself.

Many staff do not talk to each other. It is unique.

Business process changes,

I have been successful at improving communications by walking across the office to speak with someone in person.

Better understanding of what different teams are working on and an appreciation for each other's work whether it's rental development, home owner repairs or efforts to reduce homelessness.

**Appendix 16: What are your suggestions for addressing the challenges you identified in the above question?**

Open Text Responses:
Clarify delegations of authority.
Not sure, I think it could be the nature of bringing such a broad range of functions under one roof.
Keep us more updated on things to come and decisions that may be made that affect us as employees and our work.
Have the managers of each of the teams do a brief overview of at an all staff meeting. Provide the director a monthly report that is circulated to staff.
More updates on work-in-action, not necessarily after something has already been done. More employee updates, too. The newsletter used to be every couple of weeks, now it seems like they are a month or more apart.
See above.
When communicating to staff about major decisions, it should also be explained hand-in-hand with the reason behind the decision and the process it took to get there. Doesn't have to be really detailed, but enough to provide staff with enough information and context to understand the decision.
1. Better reporting up and down the emerging bureau heirarchy, with development and communication of clear team work plans. 2. Cross-staffing between delivery and planning sides of the shop. Clearer communication from strategic planning and policy group regarding their work plan and priorities so that we can flag areas where better collaboration is needed.
Communication could be enhanced by a calendar of internal meetings or events, share board for outside meetings, speakers and events. Standing committees should be publicized in advance, i.e. the diversity committee, or the executive team. Roster with team names and staffing roles.
More cross functional teams working on projects.
all of the managers relax and learn to trust each other
Clarify priorities (in order): 1. Production, 2. Planning, 3. Process/procedure
Quarterly retreats for the next year. More cross function teams both internal combined with extrenal teams to discuss issues. Right now it seems that Margaret, Andy, Jacob have discussions with partners and come and relay the information to staff. Conversely, staff have their own meetings that gives a differing perception with these same entities. To define the direction of the bureau, there needs to be more direct dialogue among staff with partners about the key issues to that the varying positions can be heard and understood.
Include everyone in a particular department when communicating decisions/updates.
Not sure how to address this beyond the meeting notes, newsletters, staff meetings, etc. we already produce. Need to build more trust with staff that they have the information they need.
We had a project matrix that seemed to be working. I believe that management thought it was too big a spreadsheet to be useful, and staff hasn't complained because it was a bother to update, but periodic updated project information that is available to all staff would be a useful tool.
Addressed above.
Need to form teams made of staff and management to take on specific problems, do continuous improvement, and set strategic direction. Needs to be a commitment from management that there is a participative environment that includes all Bureau employees.
program delivery managers should do this based on their knowledge of what their staff are doing and sharing that at manager meetings
None
Making good steps with contracts, team changes and decisions based on the entire bureau.
Underwriters working more collaboratively within team and with other sections. Regular reporting from HDF on project status
More open fora for executive team, management and staff to interact
1) Management has (and continues) offered to be available if anyone has an idea they want to share individually. This should continue. 2) Try small brown bag lunch sessions (w/Director/ Deputy Director) and 2-4 people (same and different work duties) to a more informal "get-to-know what we do, daily problems we encounter" session that may allow for some brainstorming or suggestions.
As much as decisions need to be made and changes need to happen to "align" things, delivery programs cannot be stuffed into a contracting model of doing business. Management needs to understand that and not just dismiss programs or issues which are unknown.
NA
NA
adding video capabilities.
standardized forms, possibly submitted electronically



Establish Mission - Identify Programs that deliver to Mission Define Thresholds/Goals for each program - Define Success for achieving each threshold/goal. if above is understood, assure that Regulatory and/or Contract is revised to allow for it collection. Review reporting requirements (documented in Guidelines) and assure that database is revised to collect and report out.
More informal communication (cube or office visits) would break down barriers that make the more formal means of communication (e-mails & meetings) less stiff and more productive. Folks need to get out of their cocoons.
More forward notice of large projects with consideration to funding.
Cut programs, right-size staff to program administration, etc.
Be careful of hierarchical information ladder. Or maybe it is I'm becoming aware there is a hefty hierarcchical ladder which I am unaccomstomed to. All in all. communication seems pretty good. (my fears aside :~)
Use staff meetings to inform staff of types of data collection and reporting and provide more information on budget development. Use emails for staff appreciaton or program and staff successes.
Be open and honest about it.
I have no strong opinion on this
have weekly, mandatory, training of each department and their programs and process' beginning to end.
N/A
Communicate decisions which affect us
We already have all-staff meeting and department meetings, but we really need to be able to discuss (and feel we can openly discuss) detailed work related issues not just planning and policy issues especially in our department staff meeting.
[1] Provide key staff with access to (and training on) SAP and use SAP as a key source of financial data. This way we'll be working from the same reference point. [2] Make process improvement a collaborative / cross-team effort. [3] There is certainly some expertise internally. Tap it. [4] Document. [5] Train. [6] Once implemented, hold us all accountable for following established processes.
Mandatory and voluntary interactions have not changed people's attitudes. Have people work ion other sectiosn for a week to experience what others do.
Collect employees' idea and input in difference business area
More personal contact between staff from different departments, in order to develop stronger relationships among teams.
Leadership and managers need to work together as a team and support each other. This will be observed and respected by line staff who will embrace this approach.

**Appendix 17: What are the most important processes you have to follow while performing your duties?**

Open Text Responses:
project evaluation, underwriting, approval, and closing
Timeliness, it doesn't make sense, but it is the best word to describe it. Because I am dependent on requests for data. It is important that I give requesters an accurate timeline for their requests and then accomplish the tasks within that time.
City guidelines.
We follow established program guidelines and delegation of authority. All Web pages and marketing material must be approved by Maileen.
A lot of compliance, making sure there are check-backs with staff and the public before making decisions.
Know what's going on around me. Anticipate situations. Find out what staff person does what to be more efficient.
I aim for effective, articulate communication and prompt responses (to external stakeholders and staff). In terms of daily work, I depend on the contract process timeline and keep track of multiple sub-processes that are a part of the larger contract process.
1. Contract development and execution, including ordinance development. 2. Contract desk monitoring and invoice approval. 3. Annual on-site contract monitoring. 4. Quarterly and annual grant reporting by grant source.
Internal and legislative calendars
Communication up the chain of command; work planning
keeping my direct-reports informed
Budget and credit.
Are you serious? At this point I'm unclear what the processes are. What is clear, don't do something without informing or getting the blessing of Margaret, Andy or Jacob.
Analyzing financial data. Coordinating compliance submissions.



Keeping my team informed on issues and organized around core work.
This survey is too long. It is almost rude to require that all questions be answered. (Garbage in = gargage out.)
Accountability and compliance
?
?
fiscal requirements to budget and make payments, contract development,
HUD data standards
City of Portland rules/guidelines
HUD compliance processes
The life of a loan/project
Contracting process
Grants life cycle process
Payment process
1. Know federal regulations
2. Attention to detail
3. Follow-through
4. Maintain rapport with borrowers and property management firms
5. Keep database and files updated with most current info available.
I have to multi-task and be able to do an incredibly high volume of work day in and day out while always "being on." I have to be able to talk with first time home buyers who do not speak English as a first language and be able to talk to some of the biggest developers in Portland intelligently about the intricacies of our programs meanwhile dealing with the politics and issues surrounding everything.
NA
disbursement protocols. filing, accounting for time of duties and services assigned.
Contracting
Filing documents with City Council
Loan Servicing disbursement
security
consistent
reliable
timely
All burean financial processes.
Closing the loop of information with co-workers.
Seriously?
documentation and code/statute compliance.
Too many to list
ensuring that our HMIS is operational
Triple checking my work, auditing data, improving the visual quality of the output.
timely contact with our lender partners.
Quality customer service, accurate information being sent to them.
multiple
Project setup. Budget monitoring and maintenance. Loan/grant funds reservations. Processing of contract and project disbursements.
Not all processes have not yet clearly been established.
Recommendation papers,
Cross walking old and new funding area, grants, and cost center objects
Keep people informed.
Contracting lifecycle - RFP, drafting, enforcement, monitoring, reporting and close out.
Rental/Home ownership development lifecycle - Concept, financial structuring, underwriting, closing, construction and close out.
Budget Development lifecycle - Build, approve, spend, monitor, revise and close out.
Ensure that Delivery, Business Ops and Policy and Planning are interfacing effectively.

**Appendix 18: If yes, please explain what improvements you would like to see.**

Open Text Responses:
Need to have clearer understanding of what authority I do have to make minor changes to marketing material and Web pages.

I would like for a sheet to give a brief description of each persons duties to be distributed to all staff.
Continued coordination with finance, data and intra-team staff members is already occuring and should continue to occur to help improve processes.
1. Clearer and smarter division of labor in contract and ordinance preparation with (ideally) decreased timelines. 2. Better (and ideally automated) reporting tools to track contract spending and outcomes achievement. 3. Clearer procedures and supporting materials to conduct site visits. Standardized monitoring forms, letters, and processes. 4. Ditch AMANDA, improve clarity around needed CAPER elements, and strenghten agency capacity for data analysis and program evaluation.
Right now, it's usually unclear who I need to cc on emails or talk with before I make decisions or proceed with a project. It feels like I have to communicate with all of exec team on everything.
Treat us like competent professionals, empower us by trusting us, giving us the information we need and by being less top down. Treat staff equally. Currently there are staff favorites with respect to assignments and less by role.
The Streamlining Compliance workgroup developed some key recommendations that we should explore.
We need to get to a point where users enter data once, then all funders can query that data from a central database.
We are using a team workplan now to track work and information.
More
Can not provide details here but would be happy to provide input if another contract streamlining group is formed
May be some opportunities for improving the process for underwriting/loans/disbursements.
The contracting and grant management processes would benefit from a better database tool.
1) Would like to see centralized files - this would also be a cost-cutting measure to avoid duplication of loan documents, regulatory restrictions, file supplies and cabinets. 2) Converting to electronic files and a database that can be shared by all concerning all information pertinent to a property and its loans and compliance reporting will be more efficient.
We need staff support to do our work more proactively rather than reacting to crisis and political pressure as issues and "fires" come up.
Better understanding by all parties of each persons assigned tasks.
One clear cut process for loan servicing disbursement and asset management is need. Though, this process may need a while to get a final fine tune since these two elements are new, staff are still learning, and they are like a moving target.
see #24, #25
no short cuts, follow the process. No exceptions.
See answer to question 11.
This question is too general to respond to in teh 30 minutes I've allocated to respond to this survey.
additional staff and time to accomplish more complete, accurate and through reviews and approvals. etc.
Seems like there are too many processes to be followed. Maybe that just comes with the job.
consistent definitions through out the community, standard measures, common reporting.
Better data entry by the production departments
work load prioritization and more signing authority for lesser critical programs. i.e. MCC
N/A
Springing bureacracy, no timeline or desginated person for responses
[1] I feel certain program staff need access to and training in SAP. With this access, they then can be both empowered to and accountable for monitoring the financials of their projects and/or contracts. Right now, staff don't necessarily have all the tools. [2] Our routine business processes (e.g., creating projects, executing contracts, processing payments) need to be standardized. The program and the bus ops sides of the house need to collaborate to develop functional processes that work for all of us. And once implemented, staff need to follow the established model.
Just getting the policies and processes in place.
Software inferfaces
Not sure what the best practices are. We hardly ever get to go around in Management Team so that we alll know what is going on.
Nothing is completely broken but room for improvement abounds.

**Appendix 19: What should be the key components of the PHB brand and core messages?**

Open Text Responses:
acesibility to funds
Equity, livability, accuracy
Our desire to help ALL PHB citizens and to create a livable city for all.

Making Portland a great place to call "home." Keeping Portland Affordable. Because everyone deserves a "home." Invested in providing Portland a full range of affordable housing opportunities.

We need a strong mission, and a "tagline" of sorts. We need creative marketing materials; and most importantly, those materials should NOT all look the same. Change it up, use different colors and styles for different audiences. We should learn to be flexible for the changing needs and environment. need to start publishing in different languages as well. Maileen has made giant strides in social media, and I applaud her.

We want to make it possible for low-income folks to have affordable housing.

The brand and messages will need to flow from the determined mission, vision and goals of the new bureau.

1. Hardworking people should be able to afford housing and still have enough money for groceries and other basic necessities.
2. Children deserve an opportunity to succeed in school and life, which is tied to having a stable home.
3. Housing gives people an opportunity to build better lives. To succeed you need a place to call home.
4. Its only fair that everyone has a safe, decent place to live.

Housing = opportunity & hope.

Educate the public about the core areas of need, communicate our strategy to resolve a problem and create a baseline community agreement about priorities.

That we are transparent in our decision making. A clear message of the policies and priorities we support and why we've chosen to fund some needs over others.

Creating opportunity through partnerships. We do very little directly in the community and rely instead on good implementers.

Livability, diversity, equity, creativity and innovation, stewardship, economic competitiveness, and environmental sustainability.

We provide comprehensive housing services and resources  
Bureau that sets policy direction to make Portland affordable

Sustainable  
Deliver  
Affordable Housing

Creating healthy, sustainable housing options for ALL of Portland's citizens.

productivity  
conservation of resources  
competency  
energy

A story and visible/verifiable goal reached for every dollar spent.

You asked this already

How PHB serves a wide variety of people (I want people to read the article and see that they might be assisted, or people they care about might be assisted), I want people to understand what happens when people do not get the kind of assistance we fund, an I want people to understand what barriers stop us from serving more people, and what they can do to help bring those barriers down

Housing for everyone.

Effective use of tax dollars

Affordability  
Accessibility  
Equity  
Transparency

Addressing the real needs of the community rather than the momentary enthusiasms of elected officials  
Following through on commitments

Portland Housing Bureau - a housing connection to units and services that benefit our very low income residents.

Efficient, accountable, community-oriented

We need to be the conduit to bring together the community and the resources - to connect the dots. we don't need to throw money at advertising. Rather, we need to be engaged with the community. This doesn't have to cost a lot beyond investing in staff and technology.

?

Affordable housing

Broad housing solutions for families/citizens for Portland.

Who do we serve and how do we serve them.

A really cool logo.

The products that we support or deliver.

PHB does not need a brand! We are a government bureacracy that has important work to do getting resources out the door to households that are in desperate need of them. We should operate behind the scenes, empowering our community partners to do the real work in the community.

Respect.  
 Strength in partnership (residents can come to us for help).  
 Trust. City and Residents are on the same side and can move forward together.

---

I would list the same ones that I did in the core values question.

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PHB is here to improve the life of all Portlanders.

---

I have no preference

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we are making sure that everyone in the city has knowledge of and opportunity to the programs offered. even if an individual does not qualify for a specific program at least he had the opportunity to hear or it.

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N/A

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N/A

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That is leadership's choice

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I think I'd be better equipped to answer this question after seeing some results of the various strategic plan stakeholder involvement processes.

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We serve all of Portland

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Housing opportunities

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Highly efficient steward of public funds.  
 Our programs and products serve citizens of Portland that are often overlooked by the mainstream market place.  
 PHB is grounded by it's employees who are innovative, humble and extremely productive.

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This is hard to do in a survey format.  
 PHB is helping to make Portland a city of opportunity by enabling more Portlanders to become homeowners or to rent well-maintained, affordable housing.

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**Appendix 20: Please feel free to use the space below, if you would like to add anything else related to mission, values, communication strategies or organizational development needs that will help shape PHB's Strategic Plan.**

Open Text Responses:

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The mission must support our vision and values. The mission, vision and values must be actualized in our SMART goals. The goals and the plan should have an Executive Team sponsor who is responsible for its progress and achievement. The goals should be assigned to teams who include all levels of staff and cross functional when appropriate.

---

We should have a PHB skit for Halloween and show those PDC-ers how it's done!

---

I want to emphasize the importance of having follow-up focus groups and interviews with staff (all levels and all programs/department areas), to further flesh out these ideas behind PHB's mission, goals, and organizational culture.

---

It's already been covered in Bureau-level discussion, but our mission and values should closely align with our primary federal funders.

---

The wrong decision made today is better than the right decision made tomorrow.

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The question regarding providing more resources to media. There are several competent people who can do messaging and media, but aren't working under the direction of one manager. Mailieen working directly with Margaret, but not with the rest of the staff who have skills and aptitude to contribute to this effort is inefficient and a waste of talent.

---

Second, PHB has a lot of work ahead, yet resources will be diminishing. Margaret needs to continually articulate the vision that she and the commissioner have for this bureau. She communicated to the PDC Commission and other external stakeholder that the agency would land somewhere around 50 staff, but hasn't communicated that internally which has led to rumor, anxiety and mistrust. Before communicating to external partners, it is important to share with your staff first, rather than keep them in the dark. This fosters respect and trust within the agency. We may not like the news, but we will respect the honesty, transparency and integrity.

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Would a full fledged PR campaign provide more funds for PHB mission or just be "spin" that makes us look good and makes politicians happy?

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I needed a lot more time to fill this out, 4 working days not enough in vacation season!!!

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Thanks for the opportunity to voice opinions.

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The Ending Homeless Initiative, while it may be a socially-responsible goal, is not within the financial ability of the city to achieve. Homeless persons from all over the country come to Portland for the same reasons we all do - the many and varied benefits of this region. But in addition, Portland has developed a reputation for programs assisting the homeless, including building communities. The panhandling, despite recent law changes, is a major problem for residents and guests to the Portland city center area. This aside, a large number of homeless (possibly the majority) actually choose to be homeless and live on the streets. They choose not to be involved in social service programs that will assist them with medications and housing as long as they are compliant with rules. The state has placed far too many persons with mental disabilities on the streets with no monitoring as they are not considered to be a danger. If PHB uses its diminishing resources to try to aid those who do not have the desire (or ability, in some cases) to improve themselves to get off the streets, then the resources are not being put to their best use. As mentioned earlier, I do believe programs should be available to assist homeless individuals and families who have found themselves on the streets due to loss of jobs and

housing, injuries and other reasons for inability to work where they need assistance in applying for benefits, etc. But if persons are not willing/able to follow rules, and meet program benchmarks, then they should not be eligible for assistance through the City's resources.

We, as a bureau, indeed must serve the needs of all of Portland. We may want to focus our resources on those who are underserved, but we still need to assist all Portlanders to make this a city everyone wants to and can positively call home. Housing has a large effect on the greater economy and livability of the city so we have to be more in tune with things such as "work force" housing and be able to contribute to the discussion of "Housing" on a broader continuum or we are just another "silo" in the housing arena.

Focus the delivery mission. There aren't enough resources available to do the entire continuum. We will continue to not do enough of everything without a change. It is obvious from the input from external stakeholders that they will not provide that direction - it will have to come from within.

The bureau really needs to embrace the concept of fewer future resources. We will need to say "No" to projects in the future.

n/a

As I was licking my wounds after a particularly tough day trying to figure out how I could possibly get the work done which needs to get done - what wasn't getting done and needed to be, and a thought hit me. The original PHB support staff (former BHCD) have picked up double their load and are carrying us all very well. It didn't completely stop the frustrated screaming in my head (:~), but it certainly made clear how PHB needs more staff and budget. That old BHCD staff WOWS me!

A decision was made almost 2 years ago at a top level to create one housing agency/bureau. Since then: staff has been cut then a hiring freeze was put in place; the new PDC staff received a freeze on their wages (no merit increases); some PDC staff were reclassified to lower levels of responsibility and yet continue to work at that higher level.

And, as to not create a misunderstanding, through all these changes, PHB staff continues to suit up and show up and work our jobs with some success. More success, fewer complications and healthier staff could be had with additional hands and heads.

This has been a very difficult survey to complete. I felt that I needed more information and possibly definition before I could honestly answer the questions. I have no strong opinion in many of the categories and the requirement to answer but not having an N/A or No Opinion option makes the data less than reliable. If this is intended to be anonymous, it is not; as my responses and I am sure many others are definitely spotlight the work they do. I look to our director, the commissioner and the mayor to lead the bureau.

thank you for the opportunity to input my opinion. i know that we will be a great bureau once we have clear process'.

We have an opportunity to build better processes and policies that will make PHB a great Bureau.

Not now. Will there be some time of forum where participants can scrawl late-breaking ideas.

We should have a media/messaging work group.