

Customer Service Improvement Status Report

Bureau: Portland Housing Bureau
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Bureau Mission and Goals: Please attach copies of your bureau's mission, goals, and any workplans or other policy documents that specifically address customer service improvement efforts. Please describe how your strategic plans include customer service, and any plans for improvement.

Reference Materials: Draft Strategic Plan Framework (www.tinyurl.com/4aylcam)

The Portland Housing Bureau will soon finalize a strategic plan developed with extensive input from our customers, community stakeholders and housing system partners. PHB serves those Portlanders whose need for safe, affordable housing is not met by the private market. Thus, our customers are both those persons with unmet affordable housing needs and the local agencies, non-profits and developers with whom PHB partners to deliver services.

The following is a sample of strategic goals identified in the plan that speak to customer service:

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

After the strategic plan is finalized, PHB will develop a detailed implementation plan that details the numerous concrete steps and deadlines necessary to accomplish the strategic goals. Once the implementation plan is ready, the bureau will begin to implement the strategic plan in earnest.

Customer Service Assessment: Please attach a copy of your most recent customer service survey and survey results. Please indicate how your bureau assesses timeliness, accuracy, helpfulness, expertise, and available information. If you do not currently survey bureau customers, please explain any future plans.

Reference Materials: Draft Strategic Plan Framework (www.tinyurl.com/4aylcam)
Strategic Plan Community Forum Summary (www.tinyurl.com/4pcvrlq)
Strategic Plan Focus Group Results (www.tinyurl.com/4qwgwbwy)
Strategic Plan Community Survey Findings (www.tinyurl.com/4nh6uhf)
Portland Housing Advisory Commission (www.tinyurl.com/47kxlee)

Rather than conduct a stand-alone customer survey, PHB incorporated such efforts into the bureau's intensive strategic planning process this past year. The bureau conducted a survey of Portlanders-at-large and community partners (i.e., local agencies, non-profits and developers) as well as an internal survey of bureau employees. PHB convened a community forum attended by over 80 Portlanders and facilitated several focus groups with key stakeholders. PHB published and distributed several drafts of the strategic plan to ensure interested parties in the community had the opportunity to review and respond to the successive iterations of the document. And last, the bureau vetted the strategic plan with the newly-convened Portland Housing Advisory Commission –

The Customer Service Advisory Committee is helping to implement Bureau Innovation Project #7 recommendations to improve the City of Portland's customer service. www.portlandonline.com/index.cfm?c=44196

Contacts: John Dutt, Office of Neighborhood Involvement, CSAC Chair, 503-825-2625 or Jenny Scott, CSAC Staff 503-823-3538

whose membership represents both the richness of Portland's communities and neighborhoods and the diversity of PHB's stakeholders.

The current draft strategic plan identifies the following tangible steps towards improving service to our numerous customers and stakeholders:

Sub-goal 2C - Increase participation by minority-owned and economically disadvantaged firms in the economic opportunities created by PHB's investments.

1. Establish and meet clear targets for participation in construction and professional service contracting and report results annually.
2. Convene working group to examine and improve elements of bid process that work to the disadvantage of otherwise-competitive minority-owned and economically disadvantaged firms.
3. Align with and support existing efforts to provide technical assistance to and build capacity of the sector of construction industry targeted for increased participation.
4. Designate "equity in contracting" lead at PHB to ensure that RFP's NOFA's contracts and loan documents are structured to target and incent meeting participation goals.
5. Consult with the industry about key utilization issues, including: cost barriers to state certification, diversity of workforce composition, change order management and effective strategies to improve participation by minority-owned firms. Look beyond state-certification to better assess actual participation by minority-owned firms.

Sub-goal 4B - Establish and meet the highest standards for customer service and regulatory compliance.

1. Develop and maintain strong, integrated business and data systems that streamline processes and that provide consistent, timely information on budget, accounting, contracting and performance.
2. Publish clear program guidelines for all programs to meet goals of transparency, clarity of desired outcomes and mission alignment.
3. Set and meet business system response and turn-around times for all major business functions.
4. Evaluate customer service performance and responsiveness annually through surveys and other performance management tools.
5. Develop a cross-functional team to review and improve all core business systems on a regular basis.
6. Use compliance reviews, audit findings and survey results to continuously improve customer service.

Sub-goal 4C - Provide the community with clear, consistent, reliable data on Portland's housing needs and trends and data on the performance of PHB's programs and projects.

1. Develop a PHB Dashboard that publishes and tracks key housing needs indicators and PHB-supported program outcomes over time.
2. Audit data integrity and improve reporting from PHB systems like HMIS and IDIS.
3. Standardize measures of community need and outcome reporting such as homeless counts, foreclosure rates and trends, and housing production data so community and policy-makers have clear baselines from which to evaluate need and outcome data over time.
4. Align data used in annual reports like CAPER, SEA, TIF Set-Aside Report and SEA.
5. Centralize data in PHB to promote accessibility and accuracy.

Sub-goal 4E - Ensure that a wide range of perspectives inform PHB's agenda, decision-making and policy-setting.

1. Develop a structured process for public engagement that includes a diverse, high level advisory committee that advises the bureau on policy and budget direction. This committee will perform functions currently performed by HCDC, Budget Advisory Committee and URACs.

2. Adopt broader public engagement strategies designed to regularly solicit input from non-geographic communities, communities of color, low-income Portlanders and other traditionally underrepresented voices on their housing needs and issues.
3. Include diverse community members and stakeholders in selection committees for RFP's, NOFAs and key PHB staff hires.
4. Solicit input from other sectors such as health, business, transportation, education, economic develop, sustainability/green, higher education, etc. when developing needs assessments, policy statements and priorities for housing.

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

*Reference Materials: PHB Business Operations Expectations (attached)
Diversity Development & Cross-Cultural Program (www.tinyurl.com/48txgqt)*

Recruitment

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

1. Project management – to maintain customer-friendly operations during bureau transition
2. Public finance – to maintain sound financial management that minimizes disruptions to sub-recipient contractor projects and services
3. Process improvement – to optimize business processes
4. IT & Business Systems – to develop bureau expertise that promotes alignment of bureau operations with SAP process and structural requirements

Education & Evaluation

1. Each member of the PHB administrative staff is held accountable to the bureau's "Business Operations Expectations" which set a standard for high-quality bureau customer service. Each member of the PHB staff is evaluated on customer service competency during his or her annual review. Customer service is considered a core competency for all staff.
2. As a part of the bureau's diversity development and cross-cultural program, each full-time regular PHB employee is required to earn 10 "diversity points" per calendar year. Points are earned by submitting a written summary or reflection regarding a cross-cultural experience (e.g., Attending A City Diversity Training, Performing Community Service, Attending a Community Event). Compliance with this requirement will be included in employee annual evaluations.