

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: Strategic Plan (www.tinyurl.com/4aylcam)
PHB Business Operations Expectations (attached)

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

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

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

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

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

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

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

PHB takes very seriously the feedback and priorities of its diverse customer base. The following sample describes several ways in which the bureau listens and responds to this input.

- **Strategic Plan** – PHB's customer base had a deep and broad-based role in shaping the strategic plan. (See the reference materials listed above for additional detail.)
- **Portland Housing Advisory Commission (PHAC)** – As PHB's citizen advisory body, the PHAC provides PHB with ongoing feedback regarding the bureau's strategic direction.
- **Equity Business Plan** – As PHB's customer base has made clear, PHB must make positive contributions to increasing Equity through its investments. PHB has contracted with a consultant to assist in operationalizing key Equity-related goals and process improvements identified in the Strategic Plan.
- **Contract Management Workgroup** – PHB passes significant resources to "subrecipients" (primarily non-profits) to provide services. In order to improve the effectiveness of these partnerships with subrecipient contractors, PHB has established a standing contract management workgroup whose primary charge is to engage in troubleshooting and ongoing process improvement.

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)*
 PHB Employee Evaluation Template (attached)

Recruitment

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

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

Education & Evaluation

Each member of the PHB administrative staff is held accountable to the bureau's "Business Operations Expectations" which set a standard for high-quality bureau customer service. Also, each

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

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.

BUSINESS OPERATIONS EXPECTATIONS, EFFECTIVE JULY 1, 2011

1. CUSTOMER SERVICE

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

2. TAKING INITIATIVE

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

3. TEAM MENTALITY

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

4. NOTIFICATIONS

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

5. EMAIL

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

6. MEETINGS

- a. Attending Section Staff Meetings should be a priority
- b. Be prepared for meetings and flag issues for your supervisor in advance of complex or sensitive meetings



HR-006 APE

Portland Housing Bureau Annual Performance Evaluation

EMPLOYEE INFORMATION

Employee Name

EMPLOYEE NAME

Employee Position

EMPLOYEE POSITION / TITLE

Supervisor

SUPERVISOR NAME

Work Team

- ☐ Current job description is accurate.
☐ Current (☐ job description or ☐ job classification) needs revision.

Revision Explanation

Start Date (M/D/Y)
RATING PERIOD

End Date (M/D/Y)
TO

SUPERVISOR EVALUATION

PERFORMANCE RATING	DEFINITION
Exceptional Performance	Commitment, quality and quantity of work and interpersonal relations were consistently exceptional. Job responsibilities were achieved in a clearly superior fashion. Where unusual situations arose, the response was thoroughly evaluated and implemented thoughtfully and in a timely manner.
Above Average	Work quality, quantity, commitment, and interpersonal relations exceeded work plan and job standards. All job responsibilities were met or exceeded. Where unusual situations arose they were handled in a professional manner.
Meets Requirements	Work quality, quantity, commitment and interpersonal relations were consistent with work plan and job standards. All job responsibilities were met. Where unusual situations arose, they were handled satisfactorily. Results met overall requirements.
Needs Improvement	Work quality, quantity, commitment and interpersonal relations met job standards but were marginal in some areas. Some objectives may not have been met because of problems that will require improvement.
Unsatisfactory Performance	Performance was below minimum requirements of the position and requires improvement. Significant job responsibilities and objectives were not met.

INSTRUCTIONS:

Evaluation assessments shall be conducted at least annually for each employee you supervise as a tool for constructive feedback, professional development planning and to assess eligibility for merit-based pay increases. Before completing this form, a supervisor should review and consider the following sources:

- **Employee and team work plans that set performance goals**
- **Employee performance as compared to expectations**
- **Previous evaluation and performance improvement plan**
- **Training history over the relevant period**

Employee performance should be evaluated against the total requirements and standards of the job and on the basis of activities and tasks actually performed. Under the "PERFORMANCE RATING" column, mark the box that most accurately describes the performance of the individual during the period covered and list examples of that performance in the "COMMENTS/SUPPORTING EXAMPLES" section. Examples provide key feedback to an employee and reassurance that the evaluation is squarely based upon observable considerations. For factors not applicable to the position, write "N/A". The Personal Improvement Plan (PIP) can be used for boxes marked needs improvement or unsatisfactory. The PIP will target goals for improvement.

COMPETENCIES / PERFORMANCE FACTORS PRIORITY	PERFORMANCE RATING	COMMENTS / SUPPORTING EXAMPLES
QUALITY & PRODUCTIVITY Produces or accomplishes accurate and thorough volumes of work meeting standards for volume and timeliness. Plans, and manages multiple functions, meeting goals & deadlines. Seeks improvement whenever possible. Sets & achieves individual goals & deadlines.	☐ Exceptional ☐ Above Average ☐ Meets Requirements ☐ Needs Improvement ☐ Unsatisfactory	
WORKPLACE ENVIRONMENT Proposes solutions to better accomplish PHB work. When appropriate, takes effective action without being told. Models positive communication and works	☐ Exceptional ☐ Above Average ☐ Meets Requirements ☐ Needs Improvement ☐ Unsatisfactory	

COMPETENCIES / PERFORMANCE FACTORS PRIORITY	PERFORMANCE RATING	COMMENTS / SUPPORTING EXAMPLES
to improve working environment for all colleagues and avoids innuendo and negative speculation. Strives to continually improve job knowledge & personal skills. Responds quickly to the needs and requests of others; consistently keeps clients' interests central when making decisions.		
DIVERSITY & CROSS CULTURAL GOALS Supports PHB's diversity goals for workplace and contractors. Makes people of all backgrounds feel welcome at PHB. Did you participate in accumulating points for Cultural Diversity?	☐ Exceptional ☐ Above Average ☐ Meets Requirements ☐ Needs Improvement ☐ Unsatisfactory ☐ Yes # of Points _____	
COMMITMENT & POSITIVE APPROACH Does what it takes to get the job done. Persists to overcome obstacles, demonstrates "can do" attitude and approaches work enthusiastically. Contributes to a harmonious, productive work group; acts as part of a team. Maintains reliable and consistent performance when multiple projects large volumes of work and/or tight deadlines are required; adapts to changing priorities.	☐ Exceptional ☐ Above Average ☐ Meets Requirements ☐ Needs Improvement ☐ Unsatisfactory	
COMMUNICATION Expresses self well and listens effectively; prepares and delivers effective presentations; keeps others informed; writes effectively (clear, thorough, concise, grammatically correct and appropriate in style and tone). Recognizes his/her impact on others; accepts feedback non-defensively; understands others' perspectives and modifies approach to achieve goals; deals appropriately with people in different positions and of different backgrounds.	☐ Exceptional ☐ Above Average ☐ Meets Requirements ☐ Needs Improvement ☐ Unsatisfactory	
BUDGET/COST SENSITIVITY	☐ Exceptional	

COMPETENCIES / PERFORMANCE FACTORS PRIORITY	PERFORMANCE RATING	COMMENTS / SUPPORTING EXAMPLES
Effectively uses all resources available; recommends cost savings or revenue-enhancing methods; compares costs and benefits of different courses of action and makes recommendations as appropriate.	☐ Above Average ☐ Meets Requirements ☐ Needs Improvement ☐ Unsatisfactory	
CONTRACT MANAGEMENT AND COMPLIANCE If applicable, acts fairly & consistently with all sub-recipients, as demonstrated by contractor evaluations. Work and or projects have not contributed to HUD findings during the most recent review period. Keeps on schedule with monitoring activities, quarterly and annual reports, etc.	☐ Exceptional ☐ Above Average ☐ Meets Requirements ☐ Needs Improvement ☐ Unsatisfactory	
CUSTOMER SERVICE Effectively provides customer service to both internal and external customers (eg, helping each other reach success or assisting co-workers with cross-department needs).	☐ Exceptional ☐ Above Average ☐ Meets Requirements ☐ Needs Improvement ☐ Unsatisfactory	