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*Notes*

## **LEARNING OUTCOMES**

- Upon completion of HCV and Public Housing Customer Service, you should be able to:
  - Improve the quality of customer service at the points of contact in the Section 8 Housing Choice Voucher and public housing programs
  - Identify agency and community barriers to customer service and make strategies to remove them
  - Apply the tools to assess the PHA's service delivery in order to identify strengths, vulnerabilities, and to develop an action plan
  - Identify the necessary components to develop a "Customer Service Policy"
  - Apply ideas and tools to improve the quality of service delivery and job satisfaction
  - Improve community relationships to further advance the PHA's housing goals in the context of the PHA Plan

## Notes

## Section 1 Introduction

### LEARNING OUTCOMES

- Upon completion of this section, you should be able to:
  - Discuss why it is useful to treat program participants and HCV owners like “customers”

### WE DON'T HAVE CUSTOMERS, DO WE?

- Success in the administration of the Section 8 Housing Choice Voucher program is achieved by assisting the maximum number of families that a housing agency's budget will support, and maximizing affordable housing alternatives within the community.
- In order to achieve this success, a PHA:
  - Must cultivate and retain an adequate base of property owners who are willing to do business so that there is sufficient housing available to qualified families.
  - Must obtain the cooperation and compliance of those property owners in the performance of HUD-required program functions
  - Must market its services to families who are likely to qualify in the community
  - Must obtain the cooperation and compliance of those families in the performance of HUD-required program functions.
  - Must establish itself as a willing and able community partner
  - Must, within its organizational structure, obtain a level of performance and cooperation within *and between* its various departments in order to complete a multitude of HUD-required program functions, both internally and externally.

Section 1: Introduction

*Notes*

- Success in the administration of the public housing program is achieved by obtaining the maximum occupancy rate while maintaining the public housing asset and creating a safe and comfortable living environment that supports and encourages residents to work toward economic self-sufficiency.
- In order to achieve this success, a PHA:
  - Must market its services to families who are likely to qualify in the community
  - Must screen families who apply for suitability as renters and prevent the admission of families who disrupt the living environment
  - Must obtain the cooperation and compliance of residents and their families in performing property management functions and HUD-required program functions
  - Must establish itself as a willing and able community partner in order to contribute to the overall housing strategy
  - Must, within its organizational structure, obtain a level of performance and cooperation within and between its various departments to complete a multitude of HUD-required program functions, both internally and externally
- Just as private companies provide products and services to their customers *for pay*, housing agencies provide services to the community *for pay*. And just like private companies, PHAs must market themselves, conduct transactions and deliver services to their customers within the community.
- In both HCV and public housing, PHAs provide services to families by performing the intake and occupancy functions to establish their eligibility and continued assistance.

Section 1: Introduction

*Notes*

- In public housing, PHAs provide a service to their residents by performing the necessary property management functions to maintain a desirable living environment.
- In HCV, PHAs provide services to owners by making prompt payments and conducting periodic inspections of the unit.
- In both programs, the management and staff within housing agencies provide information and services to *each other* in order to manage the program
- So, no matter what we call them—owners, participants, housing specialists, inspectors, or managers in HCV, or residents, inspectors, housing managers, accountants, specialists, or maintenance personnel in public housing—either we are their customers or *they* are *our* customers because we provide information and services to each other for pay.

## Section 1: Introduction

**GROUP DISCUSSION ACTIVITY*****Group #1: Describe the perception of your agency in your community.***

- Make a list of positive and negative perceptions as applicable.
- Are any of these perceptions true? Which ones? (List them)
- What can be done to improve any negative perceptions?

| Positive Perceptions | T/F? | Comments |
|----------------------|------|----------|
| 1.                   |      |          |
| 2.                   |      |          |
| 3.                   |      |          |
| 4.                   |      |          |
| 5.                   |      |          |
| 6.                   |      |          |
| 7.                   |      |          |
| 8.                   |      |          |
| 9.                   |      |          |
| 10.                  |      |          |

| Negative Perceptions | T/F? | To improve perception, we can: |
|----------------------|------|--------------------------------|
| 1.                   |      |                                |
| 2.                   |      |                                |
| 3.                   |      |                                |
| 4.                   |      |                                |
| 5.                   |      |                                |
| 6.                   |      |                                |
| 7.                   |      |                                |
| 8.                   |      |                                |
| 9.                   |      |                                |
| 10.                  |      |                                |



## Section 1: Introduction

***Group #2: Explore and discuss the quality of service received by the families who turn to your agency for service.***

- List the positive and negative aspects of their experience as applicable.
- Based on this discussion, what would your impression be if you applied for housing assistance at your PHA?

| Positive Experiences | Negative Experiences |
|----------------------|----------------------|
| 1.                   |                      |
| 2.                   |                      |
| 3.                   |                      |
| 4.                   |                      |
| 5.                   |                      |
| 6.                   |                      |
| 7.                   |                      |
| 8.                   |                      |
| 9.                   |                      |
| 10.                  |                      |

**Your impressions:**

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## Section 1: Introduction

***Group #3: How do other agencies and local governments view the quality of your service delivery and cooperation with them?***

- Make a list of up to five agencies and local government entities in your community.
- Put yourself in their position and rate your PHA. (1 = poor, 5 = excellent)
- Explain what your answer is based on.

| Agency/Local Government | Score they would rate us |   |   |   |           | Score based on: |
|-------------------------|--------------------------|---|---|---|-----------|-----------------|
|                         | 1                        | 2 | 3 | 4 | 5         |                 |
|                         | Poor                     |   |   |   | Excellent |                 |
| 1.                      |                          |   |   |   |           |                 |
| 2.                      |                          |   |   |   |           |                 |
| 3.                      |                          |   |   |   |           |                 |
| 4.                      |                          |   |   |   |           |                 |
| 5.                      |                          |   |   |   |           |                 |

***Group #4: How would your co-workers rate the quality of service you provide to them in the performance of your job duties?  
(1 = poor, 5 = excellent))***

- If you were your supervisor, in what areas would you recommend improvement?
- What areas would you praise?
- Explain your answers.

1. Co-workers would rate me  because:

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2. My supervisor would recommend the following areas for improvement:

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3. My supervisor would praise me in the following areas:

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Section 1: Introduction

Notes

## **Section 2      Working in the Business of Providing Housing Services**

### **LEARNING OUTCOMES**

- Upon completion of this section, you should be able to:
  - Recognize the basic elements of excellent customer service and identify basic customer needs
  - Define and explain “top down customer service”
  - Differentiate between self-directed and service-directed agencies
- The answers to the preceding questions probably point to the degree to which your agency is seen as a well-run business, and the degree to which you are viewed by clients and peers as a service-directed professional.
- Unfortunately, many housing agencies do not have accurate answers to most of these questions, because emphasis on the quality of service delivery is a recent phenomenon.
- Working in the assisted housing services industry is both challenging and rewarding, but it is not always easy.
- It requires willingness and ability to adapt to constant change, positive regard for people, and a commitment to the product of your work.

*Notes*

- It is essential that you understand how the functions and tasks you perform every day, and the attitudes with which you perform them, relate specifically to your agency's product:
  - In HCV, the maximum utilization of funding resources to provide housing assistance for eligible families.
  - In public housing, the creation of safe neighborhoods in which families can work towards the attainment of self-sufficiency

## THE BASIC ELEMENTS OF EXCELLENT SERVICE

- The average person will tell six to eight people when they receive excellent service, but they will tell at least 20 people when they receive poor service. Each of those 20 people will tell two or three more.
- What is the *essence* of customer service? What does it mean? Here is a working definition: “The essence of customer service is how you communicate and establish a relationship with those you serve.” When we use the term *relationship* it refers to quality of the transaction between you and the customer at a point of contact. It may only be for 30 seconds, or it may be over a one-hour period, as in a briefing.
- There are three basic elements to excellent customer service.

### 1. Expanding your Definition of Service

- How *you* define service effects your interactions with your customers.
- For example, you may be required to provide is the service of interviewing a family to determine their eligibility for the program.
- Your definition of service may be to “get the information” and close the interview. However, you can choose to expand your definition of service by listening with empathy, or providing options, alternatives and suggestions as to how the customer might obtain necessary documents to complete the application process.

## 2. Reconsidering who your Customers Are

- Your immediate external customers are program clients, owners (in HCV) and the general public. Without them there would be no housing program, no business reason to go to work, and no pay check.
- Your internal customers are the people who work inside your agency- people who rely on you for the services and information that they need in order to get their jobs done.
- The internal customer chain works both ways. Sometimes you are the customer, relying on the performance of others to perform your work, and sometimes you provide the services or information to others.

## 3. Developing a Customer-Friendly Attitude

- This means viewing program clients as the most important part of your job. What would a video recording of you in a typical workday look like? Would it show a person who treats clients as the focus of their work, or a person who treats clients as an interruption of their work?
- The challenge in maintaining a customer friendly attitude is the conflict between the *functions* of the job and the *essence* of the job.
- The functions of the job are ringing telephones, memos to read, paperwork to process, meetings to attend and fires to be put out.
- The essence of the job is communicating and establishing relationships. Again, the term “relationships” describes the quality of the transaction at a point of contact with a customer *in order to get something accomplished*.



Notes

### **BASIC CUSTOMER NEEDS**

- Friendliness
- To be taken seriously
- To be listened to
- Understanding and empathy
- Fairness
- Options, alternatives, or action

### **TOP-DOWN CUSTOMER SERVICE**

- Customer service is a *choice*, it does not happen by accident. The quality of service in an agency flows from management's values and good planning. The management philosophy towards service is usually reflected in the attitude and performance of staff.
- Poorly-treated employees usually treat customers poorly. The manner in which PHA management treats program staff is often reflected in the manner in which staff treats program clients. When management demonstrates high standards for the quality of service to staff, staff will pass it on to program clients.

Section 2: Working in the Business of Providing Housing Services

*Notes*

- Key questions to determine level of management commitment to service are:
  - Are customer service expectations discussed with new employees?
  - Does the PHA have a written customer service policy that includes procedures for handling complaints?
  - Is customer service tied to performance evaluations?
  - Is customer service addressed in job descriptions?
  - Are complaints tracked to identify patterns in the breakdown of service?

## **TWO TYPES OF AGENCIES**

- Self-directed vs. service-directed: the self-directed agency pleases itself and the service-directed agency seeks to please its customers.

### **The Self-directed Agency**

- Here are some typical characteristics of a self-directed agency:
  - Recognition is usually not given to the staff who provide good service but to those who excel at accomplishing internal company goals.
  - Staff have to focus most of their efforts on making their managers, rather than the customers, happy.
  - Promotion is based on seniority and favoritism rather than merit.
  - Staff is trained in the functions of the job, but never the essence of the job.
  - Departments who do not deal directly with clients do not see themselves as responsible for customer satisfaction.
  - Decisions that affect clients are made at the top, then pushed down without consulting the front line.

*Notes*

### **The Service-directed Agency**

- Here are characteristics of a service-directed agency:
  - Staff members who balance job efficiency with customer satisfaction earn recognition.
  - Managers focus their attention of supporting staff in doing their jobs well so that staff can focus their attention on providing quality service.
  - Promotion is based on good service skills as well as on seniority.
  - Training staff is a high priority with a focus on both technical and interpersonal skills.
  - All staff members know who their external and internal customers are.
  - Long-term thinking is the rule, rather than the exception.

## **Section 3      Mission, Vision, and Customer Service**

### **LEARNING OUTCOMES**

- Upon completion of this section, you should be able to:
  - Define your agency's mission and vision, and explain how these concepts relate to the customer service planning process
  - Identify key barriers to good customer service
  - Recognize that good customer service is also important on an intra-agency level
  - Identify key customer service points of contact, and describe how good customer service can be achieved through each
  - Explain some of the ways in which one's choice of words can aid in good communication
  - Identify how to provide good customer service even when you can't say "yes"
  - Discuss some of the consequences of poor customer service
  - Recognize the steps in dealing with upset customers
  - Discuss best-practices in maintaining confidentiality in customer service interactions
  - Improve community relationships to further advance the PHA's housing goals in the context of the PHA plan

*Notes*

- What is the mission of your agency? What is the vision of its leadership? These are important questions that tie into the quality of service-delivery.
- Do you know the stated mission of your agency?

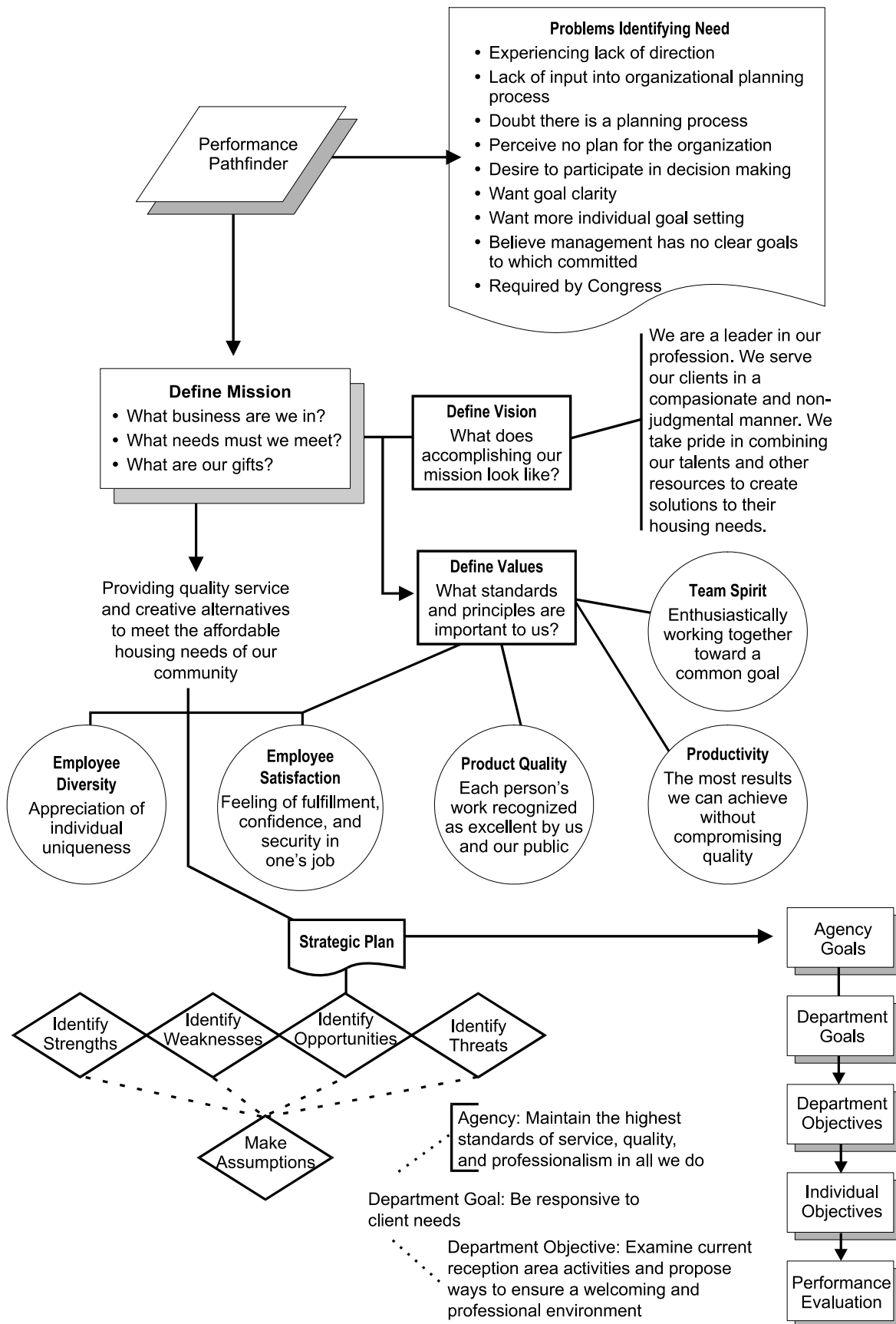
**Defining Mission**

- What business are we in?
- What services do we provide?
- Whom do we serve?
- What are our core competencies? What do we do well?

**Defining Vision**

- What does success mean to us?
- What does accomplishing our mission look like?

## Sample Planning Process Flow Chart



## **BARRIERS TO CUSTOMER SERVICE**

- The most common questions people ask (and reasons for resistance) in the discussion of how agencies provide customer service are:
  - “What if my co-worker or manager does not value customer service?”
  - “What if our agency has a *negative* history and relationship with families and property owners?”
  - “What if other agencies won’t cooperate with us?”
- These are legitimate and relevant questions for some agencies. Remember, the present-day quality of *service relationships* in a housing agency didn’t happen overnight and will not change overnight.
- In a perfect world there would not be a need for customer service training, and no one would ask the three questions above. There are no simple answers to these questions, but they are worthy of discussion here.
- The fact is that customer service in the public sector is a recent phenomenon. It has never been considered as an indicator of an agency’s overall performance.
- Housing agencies have more or less had a captive audience for decades.
- There are a number of reasons why that is changing:
  - Changes in government policy and regulations
  - growing community awareness and public scrutiny
  - The development of new and creative low-income housing alternatives causing some agencies to compete



*Notes*

**EXAMPLES OF BARRIERS TO GOOD CUSTOMER SERVICE**

- Lack of technical training
- Technical knowledge of HUD requirements is essential to good service.
  - For example, if a manager did not know how to compute annual income in cases where there is training program income, a resident could be assessed with a higher rent payment than the regulations require.
- Lack of tolerance for the differences between people, races, cultures, religions, and lifestyles
- Lack of professionalism
  - A poor attitude will actively contribute to non-cooperation, complaints, and unsatisfied residents.
- Poor management of workload and workflow
  - If a manager cannot complete the necessary administrative and clerical duties because of lack organizational skills, then residents will be perceived as a nuisance whenever they have a need for service.

## Systems vs. Individual Performance

- Historically there has been an almost societal acceptance of the “lack” of customer service in the public sector. Most people have heard *war stories* about the experience of others when for assistance at a welfare department, the social security administration, the department of motor vehicles, and yes, at a public housing agency.
  - Personnel in these agencies are often perceived as bureaucratic and non-responsive. “They just push paper, and don’t care.”
- The problem with these generalizations is that we know for a fact that there are individuals within those organizations who stand out; who do, in fact, provide excellent customer service. These individuals seem almost to be immune or separate from the regimented system around them.
- Clearly, such individuals do not set the policy for their organizations and are not in upper level management. So how is it that they provide good service?

Section 3: Mission, Vision, and Customer Service

*Notes*

- The answer is that they made a decision to take charge of the things that they could control, and not worry about what others were doing.
- Every individual gets to choose their attitude every single day. Every person gets to decide how he or she treats other people, and the interest with which they do their job.
- These personal choices do not require management or peer approval; in fact they set an example for both.
- So, in short, good customer service is first an individual responsibility and choice. There are no acceptable justifications for poor service.

Notes

### **SERVICE WITHIN AND BETWEEN DEPARTMENTS**

- Agencies do not cooperate with agencies, and departments do not cooperate with other departments; *people cooperate with people*.
- You rely upon the timeliness and quality of other peoples' work in order to perform your own work; likewise, they rely upon you, whether they are within or outside of your department.
- Each program function involves multiple tasks, and these tasks are often divided among different people. Using the following form:
  1. List at least two positions in your agency that you rely on for support and service in order to complete your work.
  2. List at least two who rely upon you.
  3. What happens if they don't deliver? Be specific.
  4. What is the result if *you* don't deliver?

***I rely on the following positions (or departments) to successfully perform my job:***

Position/Department 1 \_\_\_\_\_

- What service or information do you need from this position/department?

\_\_\_\_\_  
\_\_\_\_\_

- What are the specific consequences if they don't deliver?

\_\_\_\_\_  
\_\_\_\_\_

Position/Department 2 \_\_\_\_\_

- What service or information do you need from this position/department?

\_\_\_\_\_  
\_\_\_\_\_

- What are the specific consequences if they don't deliver?

\_\_\_\_\_  
\_\_\_\_\_

***The following positions rely on me to perform their job:***

Position/Department 1 \_\_\_\_\_

- What service or information do I provide to this position/department?

\_\_\_\_\_  
\_\_\_\_\_

- What are the specific consequences if I don't deliver?

\_\_\_\_\_  
\_\_\_\_\_

Position/Department 2 \_\_\_\_\_

- What service or information do I provide to this position/department?

\_\_\_\_\_  
\_\_\_\_\_

- What are the specific consequences if I don't deliver?

\_\_\_\_\_  
\_\_\_\_\_

## CUSTOMER SERVICE POINTS OF CONTACT

### The Telephone

- In face-to-face communication, 55% of the messages sent and received are based on body language, 38% on the tone of the voice (emotionality), and 7% on the meaning of the words.
- In telephone communication body language disappears, and 86% *is based on tone of the voice*, and 14% on the meaning of the words.
- There are three skills to acquire to improve effectiveness on the telephone.

#### 1. Inflection

- The highs and lows in the tone of the voice tell the caller your level of interest in the call. It is easy to slip into a monotone when you have to repeat the same words over and over again. Smile when talking on the phone, breathe deep, long and slow and vary your tone.
- It can also be helpful to change the stress on certain words, as in this sentence:
  - “What **would you** like us to do about it?”
  - “What would you like **us** to do about it?”
  - “**What** would you like us to do about it?”
  - “What would you like us to do about it?”  
(monotone, no interest)

#### 2. Volume

- Regulating the volume of your voice can communicate interest. Lowering the volume often makes the caller pay more attention.

### **3. Pacing the Caller**

- Pacing is approximately matching the caller's rate of speech and intensity of feeling. It is the best tool to establish rapport. By pacing you meet the caller at their own level and put them at ease.

### **Telephone Etiquette Guidelines**

- Pick up the phone within three rings
- Greet the caller appropriately
- Give your name
- Ask the caller if you can help
- ***Direct dial line***
  - "Good morning, this is John. How may I help you?"
- ***Answering for the entire company***
  - "Good morning, ABC Housing Authority, how may I help you?"
- ***Answering for a department***
  - Good morning, Eligibility Department, how may I help you?"
- ***Putting a caller on hold***
  - Ask if you may put the caller on hold
  - Wait for a response (caller can choose if they want to wait)
  - Tell the caller why they are being put on hold
  - Give a time frame
  - Thank caller for holding after returning to line

Notes

- ***Transferring a call***
  - Explain why the caller is being transferred
  - Ask the customer if he or she minds being transferred
  - Make sure someone picks up the call before you hang up
  - Tell the person to whom you are transferring the call the caller's name and the nature of the call
- ***How to take a message***
  - Explain your co-worker's absence in a positive light
  - Inform the caller of the availability of the person they want to talk to before asking their name
  - Give an estimated time of your co-workers return
  - Offer to help the person yourself, take a message, or transfer the caller to another party
- ***Ending the call***
  - Repeat any action steps you are going to take to ensure that you and the caller agree on what is going to be done
  - Ask the caller if you can do anything else
  - Thank the caller for calling
  - Let the caller hang up first
  - Write down any important information as soon as you hang up



### ***Returning telephone calls***

- People often judge customer service on the timeliness of responses to their inquiries. An important cornerstone of good customer service is prompt response to telephone calls for which you were not available. Calls should be returned at the first available opportunity and no later than the end of the business day that they were received. If a call comes late in the day, return it the following morning.
- Occasionally, the use of “telephone appointments” is an effective method to provide good customer service to avoid playing *telephone tag*.
- For example, let’s say that you have tried to return a call to someone from another agency for the second time and they are not in; try this before hanging up:
  - “Will \_\_\_\_\_ be in tomorrow?”
  - “Yes”
  - “Please give her this message. I will call her at 10:30 A M tomorrow morning.” If she is not available at that time she can reach me at 1:30 tomorrow afternoon at 555-5555.” Thank you.”
- At this point you have done everything within your power to provide prompt service.

**GROUP DISCUSSION ACTIVITY**

***Why does returning phone calls matter?***

- Make a list of reasons that returning phone calls promptly is important.

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- What gets in the way of returning calls?

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- Is there a standard at your agency for how soon calls should be returned? If so, is it realistic? If not, what should it be?

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### **Written inquiries**

- Written inquiries demand a written response
- Two working days customary
- Work towards consistency in tone and quality of letters

### **Accepting Applications and Interviewing**

- Interviewing is prime-time customer service
- Opening the interview:
  - Punctuality
  - Greeting
  - Explanation of roles (Use of visuals)
  - Explanation of objectives
  - Ground rules
- Conducting the business at hand
  - Information Gathering
  - Evaluating information
  - Obtain secondary information and clarifications as needed
  - Obtain signatures and explain documents
- Closing
  - Summarize what was accomplished
  - Explain any additional requirements
  - Explain what happens next
  - Reward for punctuality and cooperation

### **Briefings (HCV)**

- HUD-required components
- PHA sets the tone, style, and interest
- Explain other PHA and community services
- Don't forget reasonable accommodations
- Agree to meet individually, if requested
- Offer options for hard to house, if applicable
- Utilize briefing certification form
- Get feedback from attendees

### **Orientations (Public Housing)**

- Components
- PHA sets the tone and interest
- Explain PHA and other community services
- Reasonable accommodations
- Utilize orientation certification form/checklist
- Get feedback from attendees

### **Lease Signing (Public Housing)**

- Review terms of the lease
- PHA obligations
- Resident obligations
- Rent/other money due
- Billing/calling maintenance
- House rules
- Community service

### **Reexaminations**

- Evaluate policy on interims
- Minimize no-shows with effective letters
- Use same guidelines and interest as for initial interview
- Explain changes in rules and policies

### **Incoming and Outgoing Portable Families (HCV)**

- Use a portability specialist (pre-portability counseling)
- Use portability packet and orientation
- Establish contact and communicate well with the initial PHA (IHA) or receiving PHA (RHA)
- Mail required portability documents promptly
  - Consider additional documents (sex offender check, EID, etc.)
- Notify IHA promptly when family leases up or voucher expires
- Bill promptly and pay promptly

### **FSS Portability Issues (HCV)**

- Does RHA have an FSS program?
- Will RHA accept incoming portables in FSS program?
- Does RHA intend to switch forms of assistance?
- Contact RHA FSS coordinator

*Notes*

**FSS Families (if applicable)**

- Be supportive
- Explain program to non-FSS families
- Communicate with FSS coordinator

**PHA Correspondence (Letters and Forms)**

- Achieve standardization in appearance and tone of letters
- Say it simply; avoid wordiness
- Review forms for clean type, content and user-friendliness
- Ensure that all staff use the same forms and form letters

**GROUP DISCUSSION ACTIVITY**

***Sending out letters***

- Why is it important that letters be free of typos?

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- Why is it important that staff use the same forms and letters?

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*Notes*

### **Newsletters**

- Use newsletter to demonstrate and promote service strategy
- Use newsletter to obtain feedback
- Use newsletter to communicate changes in rules and policies
- Use newsletter as public relations tool in community
- Expand mailing list to include other agencies

### **Inspections**

- Emphasize interpersonal skills with inspectors
- Schedule limited-window appointments
- Use inspections to educate families and owners
- Work towards consistency on inspection standards from inspectors



## Email

- Email is public and it's all saved. When writing an email, think about whether you would write this on the PHA letterhead or post it on a bulletin board around the office. While email is quick, it's still an official written communication from the PHA.
- It's important to know your audience and adjust your tone just like you do when talking.
- Be careful when forwarding internal communications to clients. There may be confidential information contained in the email. Think about:
  - What's in that chain of emails?
  - Who am I sending this to?
  - Do they need to see the entire process?
  - Review the entire email thread for sensitive information before forwarding
  - It's often better to extract the pertinent information and create a new email thread
- Keep it concise
  - Don't lose the point by being too wordy
  - Save time by linking to resources rather than leaving everyone to find them individually
- If the email is a directive, provide pertinent information
  - What needs to be done
  - Who is responsible
  - Requirements of task
  - When it is due
  - Who needs to be informed as follow-up

*Notes*

- Be conscious of the reply options
  - Don't Reply All for agency-wide communications
  - Don't Reply All when providing criticism or individual performance feedback
  - Verify that everyone that is relevant to the communication is included on the email
  - Copy those who need to be aware of the communication, but do not need to act
- Some general tips when writing emails include:
  - Use exclamation points sparingly!!!!!!!!!!!!
  - Don't "email angry"
  - Use one-liners like "Thanks" only when absolutely necessary
  - Add the email address last
  - Avoid shortcuts to real words, emojis, jargon, or slang
  - Use "reply all" sparingly
  - Include an appropriate signature
  - AVOID ALL CAPS
  - Proofread
  - Verify you are emailing the person you intend to email
  - Only use High Importance if the email truly needs urgent attention

## LEARNING ACTIVITY: PROFESSIONAL EMAIL COMMUNICATIONS

- Directions: In groups of two, identify issues in these emails. Discuss how they could be made better.

**From:** Buddy the Elf [buddy@elf.com]

**Sent:** Thursday December 5, 2017

**To:** Rudolph Reindeer [rudu@thenorthpole.com]

**Subject:** Your Very Excellent Proposal

Dear Rudolph Reindeer, We herewith acknowledge receipt of your excellent proposal. Our project management team shall review each proposal in accordance with the regulations stated forth in the attached document and with our internal process and procedures. Should you have any additional questions, it is imperative that you direct them to our Human Resources department.

Respectfully Submitted,

\*\*\*\*\*Buddy\*\*\*\*\*

\*\*\*\*"Buddy the Elf, what's your favorite color?"\*\*\*\*

\*\*\*\*"I love to smile. Smiling is my favorite."\*\*\*\*



Section 3: Mission, Vision, and Customer Service

**From:** Ron Burgundy [ron@news.com]

**Sent:** Thursday December 5, 2017

**To:** Veronica Corningstone [veronica@news.com]

**Subject:** Thank you!!!!!!!!!!!!!! ☺

Thank you so much for applying for housing at ABC Housing Authority!!!! We have received and entered your application!!!! Have a wonderful day!!!!!!!!!!!!!! ☺ ☺ ☺

**From:** Ricky Bobby [rbobby@gofast.com]

**Sent:** Thursday December 5, 2017

**To:** Cal Naughton Jr; Jean Girard; Reese Bobby; Walker Bobby, Texas Ranger Bobby

**CC:** Lucius Washington; Lucy Bobby; Susan; Gregory; Mr. Dennit

**Subject:** Can someone please confirm that an inspection was conducted on 123 Main Street?

Section 3: Mission, Vision, and Customer Service

**From:** Allen Gamble [accountant@police.com]

**Sent:** Thursday December 25, 2016

**To:** Terry Hoitz [terry@police.com]

**Subject:** Hey

*can u tell me how to calculate the rent for that one lady. i no u went over it in training but i have had a VERY LONG week lol work ha ha ha and i lost my notes. pleeease help. Terry.*

**From:** Brennan Huff [bhuff@awesome.com]

**Sent:** Thursday December 25, 2016

**To:** Dale Dobak [ddobak@awesome.com]

**Subject:** ???????

*In reviewing our project on looking at that file. We have came to the conclusion we still need more information on this subject to be allowed funding for this project. Can you give me more information on wh will be doing work? These are some of the questions raised in our meeting last week with the boss. Also will we need to send employees there for work? Will we need to fund the airfare and expenses if travel is involved? How many other companies are involved?" We will need to set up a meeting shortly to discuss this further. I am sure I have more questions, I just can't think of them now.*

## **WHEN TO USE EMAIL VS. OTHER COMMUNICATION STYLES**

- Emails are fast communications meant to be read quickly and acted on. They are perfect for short requests, replies, updates, reminders, or check-ins. However, since emails are a more casual form of communication, they are not suitable for all occasions.
- If your communication is detailed, significant, a technical explanation of something like a new regulation, includes a new policy for something like the administration plan or ACOP or internal policy, or something else that readers will consult more than once, then a memo may be more appropriate. Your readers will be able to save the document, read it, and find it when they need the information again.
- Memos are more formal than email. They allow you to include the PHA's name and logo as well as the titles of senders and receivers. This helps the message convey more significance. Like a letter, memos should include a header, opening, summary and closing.
- Attach your memo to an email that gives your readers a brief summary of the memo's contents. For some readers, that summary will be enough. Those who need the information will read and save the memo.

- A few examples of when memos should be sent are:
  - Policy changes: This includes both when PHA policy in the administrative plan or ACOP change in addition to internal policy changes that effect all employees, such as a change to the agency's human resources policies. A memo provides formality and authority in these situations.
  - Action request: Memos are appropriate when management makes a request of all employees. For example, during an open enrollment period for health insurance, the human resource manager can use a memo to inform and request that workers turn in policy changes by a specific date.
- While email is the most frequent form of communication we use, sometimes a phone call is the more appropriate. Phone calls should be used:
  - When you need to apologize. Part of good customer service both internally and externally is providing a sincere apology when needed and apologies over the phone carry more weight.
  - When information is time sensitive. While people check email frequently, they don't always respond immediately. If information is time sensitive, you may get better results with a phone call.
  - When you anticipate there will be a lot of questions or when you are explaining something that is complicated. Questions are often answered more quickly and easily over the phone and this helps to avoid a long chain of emails.
  - When you've taken too long to respond. An issue can often be resolved in one phone call rather than multiple emails.

*Notes*

- When you need to discuss something personal
- When it's really important. You can follow up a phone conversation with an email in this case, but to be certain that you are communicating as clearly as possible, a phone call may be a better option.
- You should not use email in the following situations:
  - Giving critical feedback. Follow-up emails after your conversation may be appropriate, particularly in the case of performance reviews, but the initial conversation should not occur via email.
  - Talking about complex projects or tasks with lots of details or many people involved.
  - Delivering a difficult or sensitive message such as turning someone down for a raise or promotion. If you are dreading having a conversation with someone about a particular topic, that's probably a sign that an email is not the appropriate format.
  - Anything that is likely to cause conflict could be misinterpreted. Tone is often lost in email.
- You should also consider that sometimes you want a written record of what was said to refer back to later or provide documentation. In that case, email is an excellent tool. You can always have a conversation and then follow-up via email with a summary of what was said.



### LEARNING ACTIVITY: INTERNAL COMMUNICATIONS

- Directions: For the following situations, identify whether an **email**, **memo** or **conversation** would be most appropriate.

1. It's 9:30 am and you want to let everyone on the staff know that today at 12:00 there will be a special food truck parked outside the office.

---

2. HUD has issued a detailed new notice on rent calculation that effects the way assets are calculated.

---

3. You are a supervisor and one of the people you supervise has been leaving client files laying on their desk overnight for several days.

---

4. You want to confirm with your supervisor that a special project you're working on is to be completed by next Thursday.

---

5. Your agency's policy on when employees can take sick time has changed.

---

Notes

**VERBAL COMMUNICATION SKILLS AND CUSTOMER SERVICE**

- The words you choose can often make a difference in the perception of the quality of customer service.
- Words can build bridges for trust and cooperation or can create bad will and non-cooperation with your internal and external customers.
- They can *help* the communication or they can start an argument.
- Following are some suggestions on communication helpers.

| Argument Starter                                  | Communication Helper                                                                               |
|---------------------------------------------------|----------------------------------------------------------------------------------------------------|
| You didn't do this right.                         | There are a few areas on this form that we need to complete.                                       |
| You're wrong.                                     | I can see there's been a miscommunication.                                                         |
| You're confusing me.                              | I'm confused.                                                                                      |
| You have to.                                      | Will you... please?                                                                                |
| You should have done it this way.                 | We want your next appointment to go as smoothly as possible; this will assist you.                 |
| Wait here                                         | Would you mind waiting here while I speak to my supervisor?                                        |
| I can't.                                          | I don't have the authority. However, Ms. Smith should be able to help you. Let me get her for you. |
| It's not my job.                                  | Let me see what I can do to help. John is a specialist in that area. Let me get him for you.       |
| You never do it right.                            | This is often not done correctly.                                                                  |
| What is your problem?                             | Please tell me what happened.                                                                      |
| Boy, you're sure mad.                             | I can see how you'd be upset.                                                                      |
| I know how you feel.                              | I can understand how that could be annoying.                                                       |
| That doesn't make any sense; you're way off base. | What it sounds like you're saying is...                                                            |
| You sure have a problem.                          | Let's see what we can work out together.                                                           |

### **GIVING GOOD CUSTOMER SERVICE WHEN YOU CAN'T SAY "YES"**

- No matter how you say it, co-workers, families and owners do not want to hear the word "No." People want what they want, when they want it, and how they want it.
- But sometimes circumstances force you to say *no*, and there is nothing you can do.
- Remember that saying *yes* doesn't always ensure a happy customer, and saying *no* doesn't mean you will end up with an unhappy customer.
- Circumstances that make it impossible to say *yes*:
  - The law
  - Federal regulations
  - Agency policy restrictions
  - No resources available
  - Just not possible
  - Not enough time

### **The Hard No Vs. the Service No**

- You can, as a customer, end up not getting what you want and still feel like you received good customer service. There is a difference between a *hard no* and a *service no*.
- Giving customers a *hard no* doesn't work, but we are not suggesting that you somehow try and make a *no* sound like a *yes*.
- What we are recommending is that you learn how to use the *service no* in situations when *no* is the only answer.

*Notes*

- This technique uses two phrases, one that you begin with and one that you end with. In between these phrases are a recommended set of actions that you will do and that the customer can do.
- The first phrase is:
  - “What I will do is...”
    - This phrase tells customers that you want to help them, along with the specific actions you will take to get their problem resolved. The alternative actions you offer may not be exactly what the customer wants, but will usually help create an acceptable resolution and reduce the feelings of frustration.
- The second phrase is:
  - “And, what you can do is...”
    - This phrase tells customers that they have some control over the outcome of the situation and that you consider them your partner in getting the problem resolved (even if it’s not resolvable).
    - Possible suggestions may involve recommendations for a temporary fix, or actions that the customer can take in the future to prevent a recurrence.

**Example of a Service-no (HCV)**

- A landlord calls to complain that the amount of his HAP check is less than it should be. The financial accountant is on vacation and will not be back for two more days. The owner wants to come by the office later in the day to pick up a check for the balance he thinks is due, and no one in the office has the authority to issue a check.
- After sincerely apologizing for any inconvenience, you say:
  - “What I can do is bring this to the attention of the accountant first thing on Monday morning and she will contact you before noon.”
  - “What you can do is fax me a copy of the check, and as soon as I receive it I’ll put it on her desk. If we’ve made an error, she’ll issue a check for you to pick up on Monday.”
- Even though the owner didn’t get what he wanted (a check), he did get good service.

***Example of a Service-no (Public Housing)***

- A public housing vendor calls to complain that the amount of the check they received from the accounting department is less than it should be. The financial accountant is on vacation and will not be back for two more days. The vendor wants to come by the office later in the day to pick up a check for the balance he thinks is due, and no one in the office has the authority to issue a check.
- After sincerely apologizing for any inconvenience, you say:
  - “What I can do is bring this to the attention of the accountant first thing on Monday morning and she will contact you before noon.”
  - “What you can do is fax me a copy of the check, and as soon as I receive it I'll put it on her desk. If we've made an error, she will issue a check for you to pick up on Monday.”
- Even though the vendor didn't get what he wanted (a check), he did get good service.

### **POOR SERVICE LEADS TO UPSET CUSTOMERS**

- This applies to both internal and external customers.
- The saying “what goes around, comes around” could not be more true than in the case of poor customer service. One thing that all agencies have in common is a “grapevine” of word-of-mouth communication among recipients and owners.
- In an agency that gives poor service, this negative message often predisposes families and owners to bring a negative attitude with them when they come in to conduct business. This also holds true when the *customer* is you or a co-worker who has received poor service from a peer or another department.
- Upset customers fall into two categories; one is those who are upset because of something that we (the agency) could have controlled or avoided, and the other is those who are upset because of something that has nothing at all to do with the agency.

*Notes*

- What are the reasons that a customer may be upset?
  - Expectations that have not been met
  - Already upset at someone or something else outside of PHA
  - Feels like a victim – not much power in his/her life
  - Feel that no one will listen unless s/he yells or screams
  - Staff person was rude, indifferent or discourteous
  - Was told one thing by one staff person and something different by another
  - Doesn't feel is being listened to
  - Using "being upset" as a mechanism to manipulate you
  - Given a smart or flippant reply
  - Embarrassed at doing something incorrectly
  - Perceived incompetence of housing representative
  - Was told they don't have the right to be angry
  - Was transferred on the telephone without being told or giving his/her consent
  - His/her integrity or honesty has been questioned
- You cannot control another person's behavior, but you *can* change your behavior to avoid causing further annoyance. Even though you may not be personally responsible for the problem, you may be the one who has to deal with it. Remember that you work in a service industry.



## **The Consequences of Poor Service**

- The price that an organization pays for poor service, both internally and externally, is a steep one. When people learn to expect poor service, they respond in a number of ways:
  - Avoidance
  - Non-cooperation
  - Lack of motivation
  - Poor performance
  - Taking the offensive
  - Rudeness
  - Expecting the worst

## **DEALING WITH UPSET PEOPLE**

### **Staying Effective During Unpleasant Situations**

- Learning to deal with people who are upset is as essential to service providers as learning the technical rules of the program.
- The nature of the job requires that you will sometimes work with clients who are frustrated, confused, rude or irate.
- There are things that you can do to prevent these minor clashes from escalating into major crises.
- “Upset” people are different than “difficult” people. When a reasonable person gets upset, they may become momentarily unreasonable, but they are still basically rational and reachable.
- *Difficult* people have a psychological need to get attention by disruptive and negative means. They are chronically hard to communicate with.

*Notes*

- Following is a process for responding to and resolving conflicts with persons who are upset.

***Step 1: Let the difficult person vent***

- When people are upset, they want two things: First they want to express their feelings, and *then* they want their problem solved. They will usually vent to the first person they encounter, so trying to resolve the situation without first ***listening*** seldom works. Avoid these phrases:
  - You don't seem to understand...
  - You must be confused...
  - You have to...
  - We won't....we can't....we never...
  - You're wrong...
  - It's our policy...
- Instead:
  - Nod your head frequently
  - Say uh-huh from time to time
  - Maintain eye contact
  - Don't take it personally

**Step 2: Avoid getting trapped in a negative filter**

- The friction between you and a difficult person can be worsened by how you interpret his or her behaviors. What results is that you begin to view the person in terms of whatever label you assign to the behaviors.
- Here is an example of how a negative filter can happen.
  - Client: I brought in the form you asked for.
  - Receptionist: Well, you didn't sign it!
  - Client: Sorry about that, do you have a pen?
  - Receptionist: *(sighing)* Yes, here.
  - Client: By the way, could you tell me the status of my application?
  - Receptionist: Well, when did you apply?
  - Client: I don't remember the date, it was about a year ago.
  - Receptionist: Well, most people remember when they applied.
  - Client: *(feeling scolded)* I know and I'm sorry, but I just don't remember the date.
  - Receptionist: Well, maybe you should write it down and put it in your wallet. Have a seat and I'll try to look it up when I get a chance.
- The service provider is speaking to the client as if she is stupid. Even though the receptionist doesn't come right out and say it, the "negative filter" comes out loud and clear.
- The way out of a negative filter is to ask yourself this question:
  - *"What does this person need and how can I provide it?"*

- When you ask yourself this question, your focus changes because it provides you with an alternative filter; a service filter. The key is to complete the transaction and meet the person's need. Remember, when you start to assign labels to a person's behavior, you begin seeing them in the context of the label and start treating them accordingly. The result of negative filters is poor service.

**Step 3. Express empathy to the customer**

- When you allow a person to vent, they will eventually run out of steam. Then you can begin to participate in the conversation. Giving a brief and sincere expression of empathy can help to neutralize the person's anger or frustration.
- Empathy means appreciating and understanding someone else's feelings, but not necessarily agreeing with them. Showing empathy helps to build rapport.
- Empathetic phrases include:
  - I can see why you feel that way
  - I see what you mean
  - That must be very upsetting
  - I understand how frustrating this must be
  - I'm sorry about this
- Service providers sometimes have a hard time saying "I'm sorry" because they see it as an admission of guilt.
- Saying "I'm sorry" to a client does not imply you did anything wrong; it simply conveys that you are genuinely sorry the client has had a bad experience. Try saying it that way, "I'm sorry that you have had a bad experience."

**Step 4: Begin active problem solving**

- When you begin active problem solving, you are no longer on the receiving end. You are asking questions that get to the cause of the person's problem. Listen to everything the person says, and don't jump to conclusions.
- Gather any additional information you may need by asking good questions, then double check the facts by mirroring them to the person. Then you'll be ready to work on a solution.

**Step 5: Offer a solution and get agreement**

**Step 6: Follow up**

- Here is an example of the process:
  - Client: (angry) Your office sent me a letter that my apartment was going to be inspected last Tuesday between 8:00 AM and 3:00 PM. I took off work and nobody ever showed up. Now I get another letter saying that it has been rescheduled and if I'm not there I will lose my housing assistance. It's hard for me to get off work on short notice and my boss is mad at me now. I waited all day and nobody showed up!
  - Receptionist: I can certainly understand why you are so upset, and I'm sorry for any inconvenience the inspector may have caused.
  - Client: (frustrated) Well, what am I supposed to do if my boss won't let me off from work for this next appointment? And why do they make you stay home all day without knowing what time they'll be there to inspect the apartment, anyway? It seems like you're trying to find ways to terminate my housing...
  - Receptionist: Do you have the letter rescheduling the appointment with you now?
  - Client: Yes, here it is...

*Notes*

- Receptionist: Let me pull up your record and see if I can figure out what happened.
- Receptionist: Oh, I see that you live on Parkway drive. That's less than a mile from here, isn't it?
- Client: Yes, it only takes 5 minutes to get there.
- Receptionist: What is your regular working hours?
- Client: Well I work from 8:00 to 5:00 Monday through Thursday, and 10:00 to 6:00 on Fridays, but it's going to be tough to get another day off work for this.
- Receptionist: Would it help if we could schedule your inspection early on Friday morning so you wouldn't have to take off work?
- Client: Can you do that?
- Receptionist: Let me call the inspection department and make sure that they can have someone there on Friday.
  - Don't promise what you can't deliver. The receptionist calls inspection department and confirms availability of an inspector.
- Receptionist: How long does it take for you to get to work in the mornings?
- Client: About 15 minutes.
- Receptionist: Great! We can have an inspector there at 8:30 on Friday morning. Will that work for you?
- Client: Sure, thanks for your help.

## Using Plain Language

- We use a lot of jargon in our day-to-day communications. *Jargon* refers to special words or expressions used by a particular profession or group that are difficult for others to understand.
- Consider the following sentence:
  - *Before we do a recert with the new HOH, we should check and see if they qualify for EID since they are enrolled in FSS.*
- Would you have known what HOH, FSS, EID, or a recert was prior to working in housing?
- The problem with jargon is that excludes all of those who don't understand the terms being used. For example, teenagers make up their own slang and jargon terms to exclude their parents and teachers.
- While jargon is fine to use with your coworkers who understand the terms you are using, we have an obligation to communicate with applicants and participants using plain language to ensure that they understand their obligations under the program and the rules that govern their participation.
- The best way to avoid using jargon is to keep your audience in mind when you are communicating.
  - Pay attention to how you are speaking
  - Use ordinary terms when they are effective
  - Think about if there is a better way to say something
  - Use examples
  - When only a technical term will work, be sure to explain the term you are using

*Notes*

- Remember, using jargon doesn't make you sound smarter, it makes it harder for the client you are communicating with to understand what you are trying to tell them.
- Acronyms are another common way we sometimes insert jargon into our communications with our clients. An acronym is an abbreviation using letters. For example, EID, FSS, EIV, HAP, and RFTA are all common acronyms in housing. In order to avoid misunderstanding, and to communicate as clearly as possible, it's best to use the full term the first few times you use it.



### **LEARNING ACTIVITY: USING PLAIN LANGUAGE**

- Directions: A participant on the program has asked you questions about certain program requirements they don't understand. With a partner, alternate explaining the following using plain language.

#### **HCV**

1. When you say that I have to pick a unit that's affordable, what does that mean?
2. What's a payment standard?
3. What's portability?
4. How do you calculate how much rent I pay?

#### **Public Housing**

1. How do you figure out what the flat rent is for my unit?
2. What's the earned income disallowance (EID)?
3. How do you calculate how much rent I pay?
4. What am I required to do under community service? What if I don't do what I'm supposed to?

*Notes*

## **CUSTOMER SERVICE AND CONFIDENTIALITY**

- Applicants and participants provide personal and confidential information (and documents) for a business reason; to establish their initial and continued eligibility to participate in the program.
- A well-run housing agency maintains the confidentiality of this information within the requirements of Federal and State law *and* within acceptable ethical boundaries as well.
- The lax treatment of privileged information and documents is a poor customer service practice, and creates a major legal vulnerability to the PHA.
- PHAs should evaluate their system for maintaining the security of documents, records and files to ensure that they are accessible only to those who have a business purpose.

*Notes*

- Best practices include:
  - Train interviewers to advise families that everyone who applies is required to provide the same type of personal information
  - Inform families that personal information is used only for the purpose of determining eligibility for and participation in the program.
  - Inform families that information is kept in a secure location
  - Inform families of any limits on the confidentiality of records or information. (Local law, policy on disclosure of information to prospective owners, HUD)
  - Incorporate the treatment of confidential information into the PHA's personnel policy and orientation process for new employees
  - Disallow gossip or other inappropriate discussions about program clients among staff
  - Implement a system to ensure accountability for removal of files. Files should be stored in an area that is not accessible by the public or other unauthorized personnel
  - Ensure that the physical file set-up includes effective fasteners to keep documents secure

## **COMMUNITY RELATIONS**

### **Handling Inquiries and Complaints**

- Establish procedures. There should be clearly defined procedures for the handling of inquiries and complaints from the community, and all staff should understand these procedures.
- This includes:
  - Inquiries from applicants or potential applicants
  - Inquiries from program participants
  - Inquiries from owners
  - Refer to appropriate specialist
  - Document to file
  - Keep log of complaints
  - Respond quickly

### **The Social Service Community**

- Your agency is an integral part of the social service community. The more your representatives know about the services and requirements of other agencies, the better the quality of referrals you can make for your clients. Likewise, your service partners need to understand about the housing services you provide.
- Volunteer information to other agencies about your agency's services and requirements. Include them on your newsletter mailing list.

## Legal Services and Advocacy Groups

- Many housing agencies have a long-standing adversarial relationship with legal services and other advocacy groups. These relationships will take time and careful planning to repair, but it can be done.
- Following are some ideas for a long-term strategy:
  - Get a consensus from the board and management to undertake an ongoing plan to improve relations and minimize legal vulnerability.
  - Assign a liaison person to interact with legal services, rather than a different staff person each time.
  - Orient staff that they are expected to be objective and professional in all verbal and written communications with families, owners and the public.
  - Minimize incidents that result in challenges from legal services by:
    - Identifying and eliminating arbitrary practices and overly restrictive policies
    - Resolve more incidents sooner. Some PHAs propose the most serious remedy first and, as a result, conduct more hearings.
    - Appoint a staff arbitrator to resolve issues at the lowest possible level.
    - Evaluate past cases to determine if they could have been prevented, or if they could have been dealt with more effectively
    - Meet with legal services and ask for feedback
    - Communicate with legal services. Notify them of changes in policies and procedures. Put them on the mailing list for your newsletter. Invite them to participate on your FSS program coordinating committee.

## Notes

## **Section 4      Non-discrimination in Customer Service**

### **LEARNING OUTCOMES**

- Upon completion of this section, you should be able to:
  - Identify key issues regarding nondiscrimination in customer service
  - Conduct a four-factor analysis on limited English proficiency (LEP) for your agency and practically implement the results in developing an LEP plan
  - Recognize actions to be taken against private landlords who have illegally discriminated
  - Correctly apply program requirements and implement practical strategies for working with applicants and participants with disabilities
- Although there are multiple laws and government directives that prohibit discrimination against any person because of their race, age, national origin, family status, disability and gender, it is still pervasive across the country.

### **LANGUAGE BARRIERS**

- In addition to cultural differences, managers and staff often face language barriers. Larger agencies can afford to hire people who speak a wide variety of languages and can offer translated materials to participants.

### **LEP (Limited English Proficiency)**

- The purpose of LEP is to ensure that limited English proficient persons have meaningful access to important federal and federally assisted programs
- Census figures show that many people reported that they spoke English “not well” or “not at all”
  - 26% of all Spanish speakers
  - 29.9% of all Chinese speakers
  - 28.2% of all Vietnamese speakers

### **LEP Compliance**

- LEP compliance is based upon the protection against discrimination based upon national origin. (Title VIII, Title VI)
- LEP requirements were published in:
  - Executive Order 13166
  - Policy Guidance Notice dated December 19, 2003
- Web links:
  - [www.lep.gov](http://www.lep.gov)
  - [www.hud.gov/offices/fheo/promotingfh/lep.cfm](http://www.hud.gov/offices/fheo/promotingfh/lep.cfm)



*Notes*

- PHAs most likely to get a compliance review might have the following situations:
  - Title 8 complaint filed against them
  - Fair Housing review leading to a management review
  - Newspaper articles alleging discrimination in this area
  - Inconsistency between Agency Plan and Consolidated Plan
  - Fair Housing Complaints
  - Long time since last review (3-5 years)
  - Other indications of problems

***Who is a LEP Individual?***

- LEP individuals include persons who do not speak English as their primary language and have a limited ability to read, write, speak or understand English. This includes PHA applicants and participants as well as family members.
- PHA LEP obligations include taking reasonable steps to ensure meaningful access to PHA programs, services and activities to LEP persons, while not imposing undue burdens on small local governments or non-profits

### **Four Factor Analysis**

- PHAs must conduct a four-factor assessment on:
  1. Number or percent of LEP persons eligible to be served or likely to be encountered
  2. Frequency with which LEP persons come into contact with the program
  3. Nature and importance of the program to people's lives
  4. Resources available to the PHA and associated costs
- A self assessment tool is available at [www.lep.gov/selfassesstool.htm](http://www.lep.gov/selfassesstool.htm)
- PHAs should apply the four factors to the various types of contacts they have with the public, assess language needs, then decide what reasonable steps to take to ensure meaningful access for LEP persons

### **FACTOR 1**

- **Number or proportion of LEP persons eligible to be served or likely to be encountered from particular language groups eligible to be served or encountered**
  - The greater the number or proportion, the more likely pre-arranged language services are needed
  - Less frequent contact with a particular language may require less intensified solutions

*Notes*

**FACTOR 2**

- **Frequency with which LEP persons come into contact with the program (of particular language groups)**
  - Also consider the frequency/intensity of individual contact. The greater the frequency, the greater need for enhanced language services.

**FACTOR 3**

- **Nature and importance of the program, activity or service provided by the program to people's lives**
  - Think of consequences of failure to communicate effectively. The more important the contact, the more likely timely, high quality language services needed

**FACTOR 4**

- **Resources available to the PHA and associated costs of providing different types of language services**
  - Carefully explore all options before limiting access based on this factor
  - A good self-assessment will identify the resources – dollars and personnel – available to ensure provision of language assistance to LEP individuals

## LEP – Practical Implementation

- Be aware that HUD may contact your agency to complete an unrelated review, which may lead to a fair housing review to include how your agency is addressing limited English proficiency.
- What to do first:
  - Complete the HUD Language Assistance Planning and Self-Assessment Tool at [www.lep.gov](http://www.lep.gov)
    - This will clearly show you what steps you need to implement.
  - Get community input
    - Invite community partners who provide services to low-income persons that are LEP to a planning meeting to assist your agency in developing a plan that can work within your community and gain their input in meeting your goals.
  - Train community partners
    - Use this planning meeting to provide training to community partners regarding how Housing Programs work; how to apply for housing; what preferences are; income-limits; etc.
    - Remember, these are partners that may be the first point of contact with LEP persons and can answer initial questions on the basics of how your program works

*Notes*

- What next?
  - Contact your university or other resources to identify your LEP population as they may have the most current statistics vs. census data.
  - Identify skilled staff that can participate as a planning team and assist in translating documents.
  - Translate forms identified as vital documents and list these in your LEP Plan.
  - You may want to contract with a professional translator to edit and certify documents after staff translate to ensure proper translations.
- Samples of “vital” documents
  - Applications for admissions
  - Personal declaration form
  - Zero income certification form
  - Lease
  - Continued occupancy forms
  - Fraud notice
  - Verification forms (including HUD 9886 form)
  - Reasonable accommodation request forms
  - Voucher
  - FSS contract and outreach
  - Repayment agreements
  - Grievance policy
  - Fair housing and LEP posters in lobby
- Tagging documents
  - Use tags on all other correspondence, notices, and brochures that will advise the recipients that if they cannot read the English document to contact your agency. (Of course, this should be written in the appropriate language of the identified LEP persons in your community).

- Identify staff persons who have the skills to translate and interpret for clients and establish a bilingual staff list. Ensure all employees receive a copy of this list and know the procedure for contacting and/or scheduling contracted interpreters.
- Ensure there is a **written procedure** on how to handle LEP contacts via telephone, in person or written correspondence.”

### ***Market your LEP Plan***

- Develop an affirmative fair marketing plan which should include how you will market your LEP plan.
- Develop flyers, brochures and other marketing material that will advise clients that your agency has an LEP plan and that these services are free. Distribute through our community.

### ***Monitor Your LEP Plan***

- Develop staff training to ensure all current and new employees understand this policy. Make this a part of new employee orientation.
- Develop monitoring systems to track your goals as outlined in your plan. Example, track the number and frequency of contacts using logs or through an automatic phone system for callers.
- Assess the number of residents/participants or applicants who are within your LEP population compared to those numbers the following year.
- Assign a person/department to update annually.
- Maintain your updates and outcomes for possible HUD reviews.

### **Sample Outline for LEP Plan**

- Introduction- What is LEP and who are your LEP population (s). Include a statement of commitment to ensuring the accessibility of your programs and services to all eligible clients including LEP persons.
  - A. Vital documents
  - B. Oral language service
  - C. Outreach
  - D. Staff training
  - E. Monitoring your plan
  - F. Postings

### **PROHIBITION AGAINST DIFFERENTIAL TREATMENT AND DISCRIMINATORY EFFECTS**

- Managers must ensure consistent application of program rules, services and procedures for all applicants and participants.
- A fair housing claim against the housing agency may arise the moment a family is treated different from a similar family.
- Policies must apply equally to all Housing Choice Voucher families, and procedures must be followed the same for everyone.

Section 4: Non-discrimination in Customer Service

*Notes*

- You should also make sure program policies and procedures do not discriminate against a particular population.
  - One manager was dismayed to find among her staff an informal belief that families of a particular national origin were more likely to engage in fraud.
  - Special attention was paid to the verification forms submitted by families of this national origin.
  - Staff often requested additional information and proof from these families. The housing agency was wide open for a fair housing lawsuit for this, even though it was not sanctioned by any policy or procedure of the housing agency.
- You should make sure the entire staff knows their responsibility to ensure equal administration of the program.
- As manager, you should make clear that discriminatory practices will not be tolerated at any level.
- Staff should know that comments that unfairly stereotype a client based on their background, or mimic an accent, or jokingly discuss a client's perceived mental state are inappropriate in the workplace.
- One way to promote ongoing awareness and sensitivity to cultural difference is to sponsor monthly brown bag lunches with speakers from various cultures and backgrounds in the staff break room.
- You might also organize more formal training for staff, focused on the need to be sensitive and understanding of the many different backgrounds and abilities of the people they serve.



- If a staff member is involved with a particular community, you might occasionally allow time off or pay that person to attend a function on behalf of the PHA to inform people about the program and get their feedback.

### **ACTIONS AGAINST PRIVATE LANDLORDS WHO HAVE ILLEGALLY DISCRIMINATED IN HCV**

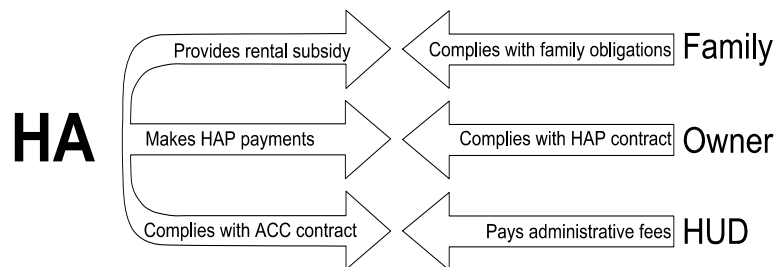
- Once a landlord has been found to have violated fair housing laws, HUD regulations prohibit the housing agency from dealing with them unless there has been proof of that landlord's present and future compliance with all fair housing laws.
- Therefore, a HCV manager should understand both landlord-tenant law and fair housing law as it relates to private landlords.
- The manager should also have a good working relationship with the local fair housing agency.
- The fair housing agency should know to contact the agency when a HCV tenant has filed a fair housing grievance against a HCV landlord in their jurisdiction, so the HCV manager can also monitor and assess the situation.
- Fair housing protection is one of the critical pieces of civil rights legislation that still has strong enforcement capabilities.
- A participant has one set of rights and responsibilities in relation to the PHA. Another independent set of rights and responsibilities flow between the private landlord and the HCV tenant.
  - These come from the lease and from federal, state and local landlord-tenant law.

*Notes*

- Though the housing agency is not directly involved with the lease, it is often called upon to mediate and/or act as a resource for resolving conflicts that arise between a landlord and a tenant.
- The housing agency is encouraged to help when possible, to ensure family compliance with their lease responsibilities and to keep landlords satisfied with the HCV program.
- Since HUD regulations list “serious or repeated violations of the lease” as grounds for termination of HCV assistance, the housing agency must become more aware and involved with lease violations.
- If the lease violations relate to a tenant’s disability, the housing agency may have a duty to provide mediation assistance with the landlord if requested as a reasonable accommodation.
- It may also need to consider the disability as a mitigating factor for the violation and provide the tenant an opportunity to show how a reasonable accommodation will prevent future lease violations before terminating HCV assistance for the violation.
- In the HCV program, the PHA is not the participant's landlord, nor is the PHA responsible for screening an applicant's suitability for housing.

- Instead, in a delicate balance among the parties:
  - The housing agency provides a rental subsidy and enforces the participant's family obligations.
  - It also enforces specific regulatory provisions incorporated into the Housing Assistance Payments Contract with the private landlords of HCV tenants.

### Mutual Responsibilities



### EQUAL ACCESS RULE

- The Equal Access to Housing in HUD Programs Regardless of Sexual Orientation or Gender Identity Final Rule, effective March 5, 2012, also requires that HUD-assisted housing be made available without regard to actual or perceived sexual orientation, gender identity, or marital status. As part of this rule, administrators and owners of HUD-assisted housing, and private owners participating in multifamily programs may not inquire about the sexual orientation or gender identity of an applicant or occupant for the purposes of making eligibility determinations or otherwise making housing available. Private owners participating in the HCV program become subject to the rule at the point when the owner executes a housing assistance payments (HAP) contract with the PHA. [*Federal Register* Notice 02/03/12, Notice PIH 2014-20]

## **OTHER STATE AND LOCAL FAIR HOUSING LAWS**

- In addition to the classes protected under federal law, PHAs must be aware of protections that may be provided by state or local ordinance.
- These laws could have implications for the agency's definition of family in the administrative plan, to ensure all families are treated equally according to that jurisdiction's fair housing laws.

## **PARTICIPANTS WITH DISABILITIES**

- Following is an overview of a manager's federal rights and responsibilities toward applicants and participants with disabilities designed to give you:
  - A good understanding of the major federal laws protecting people with disabilities
  - A format for addressing general program and structural accessibility
  - The correct approach to a request for a reasonable accommodation
  - Practical strategies for implementing the requirements in each function area of the program.
  - Proper protocol for assisting particular disabilities
- You should also be aware of any additional state and local laws that may also be applicable to your program. These tend to be similar to the federal laws.
- This material has been written for non-lawyers and does not include citations to case law. It will cover the major areas a manager must be aware of and provide guidance on appropriate actions to take to comply with the HUD requirements.

*Notes*

- Some areas of disability law are very clearly defined in the HUD regulations and fair housing laws, but other areas are quite uncertain. Until these areas have been definitively decided, there are no clearly right or wrong answers, and you must use your best judgment to interpret what the regulations seem to suggest.
- Due to the potential for errors, omissions, or inaccuracies that may exist in the materials and information provided, there is some risk associated with reliance on such information. It would be prudent to consult an attorney regarding any pending legal matter related to the information contained in this section.

### The Americans With Disabilities Act

**Breaking Down Barriers** We need your help to ensure all our programs, services, and activities are accessible to people with disabilities. In visiting our offices, if you observe a barrier that prevents the full participation of people with disabilities, let us know.

*Notes*

## **THE UNIQUE ROLE OF THE PHA**

- As a federally funded program, your department has an affirmative duty to ensure that people with disabilities have equal access to the housing program.
- Legal protection for people with disabilities has greatly expanded in recent years, and managers *must* know how to comply with federal, state, and local laws.
- Most resource manuals dealing with PHA responsibilities to their participants with disabilities focus on the PHA's role as a direct housing provider.
- In both programs, the housing agency is accountable to HUD (through the Annual Contributions Contract) for being accessible to people with disabilities and to provide them an equal opportunity to participate in the program.

*Notes*

## **AN OVERVIEW OF FEDERAL DISABILITY DISCRIMINATION LAWS**

### **Section 504 of the Rehabilitation Act of 1973**

- Before 1988, the definitive law that protected people with disabilities was Section 504 of the Rehabilitation Act of 1973:
  - No otherwise qualified individual with handicaps in the United States...shall, solely by reason of her or his handicap, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance...
- Subsequent laws have either taken their wording directly from Section 504 or adopted language similar to it.
- Courts have adopted decisions from 504 law to interpret the meaning of more recently enacted disability laws.
- Section 504 requires PHAs to affirmatively ensure that people with disabilities are given an equal opportunity to participate in the public housing or HCV program. HUD's Section 504 regulations provide a more detailed explanation of PHA responsibilities.

- A “qualified” person with a handicap:
  - Must be afforded an *opportunity equal* to that afforded to others, and/or
  - Must be provided housing or benefits as *effective* as those afforded to others, and/or
  - *May not be provided different or separate* housing or benefits unless necessary to provide the person with a handicap with housing or benefits that are as effective as those provided to others.
- These regulations make clear that it is not necessary to produce an “*identical*” result. Instead, the law affords people with handicaps an “equal opportunity to obtain the same result, to gain the same benefit, or to reach the same level of achievement.”
- In addition, there is an obligation to administer the program in the most integrated setting appropriate to the needs of qualified individuals with handicaps.
  - For example, it is better that a hearing-impaired person should participate in the general tenant briefings, with perhaps a sign language interpreter, than to segregate the applicant in an individual briefing.
  - However, in the case of a tenant with severe Attention Deficit Disorder (ADD), it may be appropriate to work one-on-one with them to make sure they understand the briefing material.
- In each case, *a participant with a disability must ask for an accommodation of their disability before the housing agency treats them differently.*



## **The Fair Housing Amendments Act**

- The Fair Housing Act prohibits housing discrimination based on race, color, religion, sex, and national origin, regardless of whether federal funds are involved.
- The Fair Housing Amendments Act (FHAA) of 1988 extended this law to prohibit discrimination against people with disabilities and family status, otherwise known as discrimination against families with children, in almost every kind of housing-related activity, including advertising, renting, selling, and lending.
- The FHAA's prohibitions are substantially similar to 504's, but you must be aware of both laws. The framework for addressing reasonable accommodations is most clearly spelled out in the FHAA regulations and subsequent case law.
- The non-discrimination provisions also apply to most private landlords in the HCV program (there are minor exemptions for certain dwellings).
- The PHA office will likely be contacted by both landlords and disabled tenants regarding each party's rights and responsibilities under the FHAA.
- In the HCV program, often the issue will arise regarding a requested modification or accommodation. Other than providing the family or owner with literature on FHAA (available from HUD) and HUD Form 903, and referring them to the appropriate agency, you should stay out of landlord-tenant fair housing disputes.

Section 4: Non-discrimination in Customer Service

*Notes*

- In the HCV program, however, if a landlord is found guilty of discriminatory conduct, the HCV manager may need to terminate the landlord from the program or do something to make sure it will not happen again.

## **Title II of the Americans with Disabilities Act (ADA)**

- Signed into law in 1990, the ADA is the most comprehensive civil rights law for disabled people. Title II of the ADA and the regulations that implement it extended 504's non-discrimination policy to apply to all activities of "public entities"—specifically state and local governments—regardless of whether they receive federal funds.
- Title II did not add many additional obligations to the PHA that were not already there under the HUD 504 regulations. It mostly extended to all levels of government activity the anti-discrimination requirements already in effect for federal agencies.
- However, if your housing agency employs more than 50 people, Title II requires the housing agency to adopt grievance procedures for anyone denied a reasonable accommodation, *including applicants*.
- The grievance procedures can be the same as the regular informal hearing procedures, as long as they provide due process. ADA case law will affect the PHA, so you should stay aware of legal developments.

*Notes*

***Title III of the Americans with Disabilities Act (ADA)***

- Title III applies to any privately owned public accommodation, such as:
  - Homeless shelters
  - Restaurants
  - Public transportation terminals
  - Banks
  - Offices
  - Senior citizen centers
  - Day care facilities
- It does not apply to strictly residential facilities, but it does cover a private landlord's public space within a residential facility, such as:
  - Rental office
  - Community room
  - Pool
  - Any other amenity that is rented out or offered for use to the public.
- Title III requires public accommodations to:
  - Remove physical barriers that are readily fixable
  - Provide auxiliary aids, if it will not result in an undue burden
  - Make changes in rules, policies and procedures, if it will not fundamentally alter the nature of the program.
- It also contains specific requirements regarding new construction and altering an existing facility.

## Federal Laws Prohibiting Housing Discrimination Against People with Disabilities

| <b>Rehabilitation Act<br/>(29 USC 504 &amp; 29 USC 794)</b>                                                                                                                                                                                                                                                                                                                                                                                           | <b>Fair Housing Amendments Act (42 USC 3601)</b>                                                                                                                                                                                                                                                                                                                                                                                                      | <b>Title II of the Americans with Disabilities Act (ADA)</b>                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Prohibited or required practices</b>                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Cannot discriminate, exclude, or deny benefits solely because of disability.<br>Must provide reasonable modifications in all rules, policies, and procedures.<br>Program must be readily accessible and usable by individuals with disabilities.                                                                                                                                                                                                      | Cannot discriminate.<br>Provide reasonable accommodation in rules, policies, and procedures.<br>Allow tenant to make reasonable physical accommodations.                                                                                                                                                                                                                                                                                              | Cannot discriminate, exclude, or deny benefits solely because of disability.<br>Must provide reasonable modifications in all rules, policies, and procedures.<br>Program must be readily accessible and usable by individuals with disabilities.                                                                                                                                                                                                      |
| <b>Housing covered</b>                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Any housing that receives federal funds, including public housing agencies and assisted-housing providers.                                                                                                                                                                                                                                                                                                                                            | All housing except owner-occupied 4-, 3-, or 2-family housing                                                                                                                                                                                                                                                                                                                                                                                         | Housing provided by state and local governments and their entities, including public housing agencies.                                                                                                                                                                                                                                                                                                                                                |
| <b>Definition of a person with a disability</b>                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| A person who<br>has a physical or mental impairment that substantially limits a major life activity, such as walking, thinking, speaking, breathing, hearing, learning, or working.<br>a record or history of an impairment that limits a major life activity, even if the person no longer has the disability or if the disability no longer limits a major life activity.<br>is regarded as having an impairment that limits a major life activity. | A person who<br>has a physical or mental impairment that substantially limits a major life activity, such as walking, thinking, speaking, breathing, hearing, learning, or working.<br>a record or history of an impairment that limits a major life activity, even if the person no longer has the disability or if the disability no longer limits a major life activity.<br>is regarded as having an impairment that limits a major life activity. | A person who<br>has a physical or mental impairment that substantially limits a major life activity, such as walking, thinking, speaking, breathing, hearing, learning, or working.<br>a record or history of an impairment that limits a major life activity, even if the person no longer has the disability or if the disability no longer limits a major life activity.<br>is regarded as having an impairment that limits a major life activity. |

## Section 4: Non-discrimination in Customer Service

| <b>Rehabilitation Act<br/>(29 USC 504 &amp; 29 USC 794)</b>                                                                                                                                                                                                                                                                                                                                              | <b>Fair Housing Amendments<br/>Act (42 USC 3601)</b>                                                                                                                                                                                                                                                                                                                                                     | <b>Title II of the Americans with<br/>Disabilities Act (ADA)</b>                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Are people with psychiatric disabilities covered?</b>                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                          |
| Yes<br>if the psychiatric disability substantially limits a major life activity<br>or if a housing provider thinks the person's psychiatric disability or perceived psychiatric disability limits a major life activity<br>or if the person has a history of psychiatric disability that limits a major life activity, and the housing provider discriminates against the person because of the history. | Yes<br>if the psychiatric disability substantially limits a major life activity<br>or if a housing provider thinks the person's psychiatric disability or perceived psychiatric disability limits a major life activity<br>or if the person has a history of psychiatric disability that limits a major life activity, and the housing provider discriminates against the person because of the history. | Yes<br>if the psychiatric disability substantially limits a major life activity<br>or if a housing provider thinks the person's psychiatric disability or perceived psychiatric disability limits a major life activity<br>or if the person has a history of psychiatric disability that limits a major life activity, and the housing provider discriminates against the person because of the history. |
| <b>Is current illegal drug use covered?</b>                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                          |
| No<br>If the illegal use of controlled substances occurred recently enough to justify a reasonable belief that a person's drug use is current or that continuing use is a real and ongoing problem.                                                                                                                                                                                                      | No                                                                                                                                                                                                                                                                                                                                                                                                       | No                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Is a history of illegal drug use covered?</b>                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                          |
| Yes<br>if recovered from addiction, i.e., successfully completed a rehabilitation program and not using,<br>or if participating in a treatment program or self-help group and not currently using drugs.                                                                                                                                                                                                 | Yes<br>if recovered from addiction, i.e., successfully completed a rehabilitation program and not using,<br>or if participating in a treatment program or self-help group and not currently using drugs.                                                                                                                                                                                                 | Yes<br>if recovered from addiction, i.e., successfully completed a rehabilitation program and not using,<br>or if participating in a treatment program or self-help group and not currently using drugs.                                                                                                                                                                                                 |
| <b>Are people who have alcoholism covered?</b>                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                          |
| Yes                                                                                                                                                                                                                                                                                                                                                                                                      | Yes                                                                                                                                                                                                                                                                                                                                                                                                      | Yes                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Are people with AIDS or who are HIV+ covered?</b>                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                          |
| Yes                                                                                                                                                                                                                                                                                                                                                                                                      | Yes                                                                                                                                                                                                                                                                                                                                                                                                      | Yes                                                                                                                                                                                                                                                                                                                                                                                                      |

### **PRINCIPLES OF HCV ASSISTANCE TO PEOPLE WITH DISABILITIES**

- It is possible to craft accommodation policies and procedures that satisfy the intent of the laws without imposing unintended burdens on either people with disabilities or housing agencies.

### **PRINCIPLES OF PUBLIC HOUSING ASSISTANCE TO PEOPLE WITH DISABILITIES**

- It is possible to craft accommodation policies and procedures that satisfy the intent of the laws without imposing unintended burdens on either people with disabilities or housing agencies.

### **Make Reasonable Adjustments**

- The housing agency has an affirmative obligation to make reasonable adjustments to the rules, policies, practices, procedures, and physical premises so people with disabilities have equal access to the housing program.
- The housing agency should first modify the general program through a self evaluation and transitional plan. Then it should adopt policies and procedures to process requests for accommodation.
- This holds throughout the program:
  - Applications
  - Admissions
  - Determinations of eligibility
  - Physical inspections
  - Leasing
  - Annual activities
  - Portability in HCV
  - Termination of participation

### **Treat each case individually**

- The essential commandment of federal anti-discrimination laws is that everyone should be treated on their individual merits.
- You *must* go through the proper procedures when considering a person's request for an accommodation.
- The housing agency's legal protection from a disability discrimination claim lies in having written proof that good-faith, individual consideration was given to that particular person.
- Rejecting a request for a particular accommodation without making an individual assessment is asking for legal trouble.
- What may be reasonable for one person may not be reasonable for another in a similar situation.
- Each person with a disability deserves objective individual consideration free from stereotypes, assumptions, and subjective fears and prejudice.
- Instead of blanket rules and inflexible policies, the housing agency should work creatively with participants to create solutions that will allow disabled family members to meet their program obligations.



### **Essential Program Requirements Need Not Be Waived**

- A reasonable accommodation allows a person with a disability to meet essential requirements of family participation, but it does not require reducing or waiving essential requirements.
- Participants and staff are responsible for working together to identify an accommodation each finds reasonable.
- The manager must ensure that the accommodation will enable the participant to meet the full family obligations.
- If the family member is still unable to completely meet the essential requirements even with the accommodation, the manager is justified in terminating the family member's participation in the program and possibly referring them to another form of housing assistance with social services that are beyond the scope of the regular program.

### **Consider the Participant's Choice of Accommodation**

- Special consideration should be given to the participant's choice of accommodation. Accommodations are not reasonable if they require fundamental alterations in the nature of the program or impose undue financial burdens on the department.
- Staff may not be required to make specific accommodations or physical modifications if equally effective alternatives permit full program participation.

### **It May be Costly**

- Reasonable accommodations are sometimes costly. Congress anticipated this additional financial commitment and made clear that they intended the federal programs to lay out resources where necessary to ensure equal access to people with disabilities.
- In determining whether a particular accommodation is an undue financial burden, the budget as a whole is considered.

### **Verification is Permitted**

- Staff may confirm a participant's disability as a condition of statutory eligibility in the context of rent computation, qualifying for specific units, or reasonable accommodations.
- However, the staff may not unduly infringe on a participant's right to privacy.
- The staff may inquire and seek verification of a disability only to the extent needed to determine:
  - If a reasonable accommodation is needed
  - If an individual qualifies as disabled under the HUD definition
- Information received is confidential, and its use should be limited to specific necessary program functions.

*Notes*

### **Information Must Be Accessible**

- Information must be provided in an accessible format, when requested. People must be informed of their right to ask for a reasonable accommodation, but a staff person should never offer assistance that has not been asked for by the participant.
- Everyone should be treated the same until they request to be treated differently. The idea is to get away from the staff person's assumptions and stereotypes and allow each person with a disability to decide for themselves what kind of assistance they require.
- This does not preclude staff from prompting a person to articulate a need if it becomes obvious that the person is having difficulty with the process, but to be safe, it is best to prompt everyone equally.

*Notes*

## **ETIQUETTE FOR INTERVIEWING PEOPLE WITH DISABILITIES**

### **Scheduling**

- Some interviewees with visual or mobility impairments will phone in, prior to the appointment date, specifically for travel information.
- The scheduler should be familiar with the travel path in order to provide interviewees with detailed directions.
- Make sure the place where you plan to conduct the interview is accessible by checking the following:
  - Is disabled parking located nearby?
  - Is there a ramped or step-free entrance?
  - Are there accessible restrooms?
  - If the interview is not on the first floor, does the building have an elevator?
  - Are there any water fountains, and telephones at the proper height for a person in a wheelchair to use?
  - If an interview site is inaccessible (e.g. steps without a ramp, or a building without an elevator) inform the person about the barrier and offer to make arrangements for an alternative interview site.
- Affirmative steps must need to be taken to permanently remove the physical barriers and/or add accessibility features.
- When scheduling interviews for people with disabilities, consider their needs ahead of time.

Section 4: Non-discrimination in Customer Service

*Notes*

- When giving directions to a person in a wheelchair, consider
  - Distance
  - Weather conditions
  - Physical obstacles such as stairs, curbs, difficult to open doors, and steep hills.
- Use specifics such as “left one hundred feet” or “right two yards” when directing a person with a visual impairment.
- Be considerate of the additional travel time that may be required by a person with a disability.
- When scheduling an interview, be aware that the person may be required to make a transportation reservation 24 hours or more in advance.
- When arranging the interview time, give the interviewee an estimated finish time so they can schedule their return trip.
- If a person requests a home visit as a reasonable accommodation, it may be appropriate for the housing officer to travel to the person’s home.
- However, do not assume that a person with a disability would prefer the home visit. There are many people who will prefer to come to the office.
- Grant each person the ability to make their own individual choice of the particular accommodation, if any, they require.

## **Courtesies**

- Give people with disabilities the same professional, competent interviews that others receive.
- Think of disabilities as challenges that can be overcome with ingenuity and open communication.
- Make normal eye contact with the person you are interviewing.
- Speak directly to the person you are interviewing. If the person has brought another person to assist them, ask who will be providing the primary information for the interview; don't automatically assume that a person with a disability is not able to speak or communicate for themselves.
- Even if the primary information is provided by the attendant, be sure include the disabled person in the conversation with body language and eye contact.
- Avoid speaking to the interviewee in a simplistic way, unless they make clear to you that they would like you to convey the information in a different form than you usually do.
- Don't run the person over with offers of assistance. Let the person instruct you as to what they may or may not require. If assistance is declined, respect that decision and do not insist on providing it anyway. This may make you feel more comfortable, but it is likely to irritate and alienate the person.
- Don't convey sympathy or pity. A disability is a difficulty that the disabled person has learned to manage. In many cases, this management of a disability means the individual has developed rare degrees of strength in other areas.

*Notes*

- Do not panic if you use a phrase of speech like “See you later” or “Let’s go for a walk” with a person with an impairment that prevents them from literally doing the activity. people with disabilities understand that it is a figure of speech and understand the message you meant to say.
- People with disabilities may communicate in a way that is different than you may be used to. However, if the person infringes upon your personal space in a way that makes you uncomfortable, or communicates something to you that is inappropriate, it is acceptable to state your needs and boundaries to that person.

***Interviewing People with Visual Impairments***

- When greeting a person with a visual impairment, always identify yourself and introduce anyone else who may be present.
- If the person does not extend their hand (to shake hands), orally extend a welcome.
  - Example: It is nice to meet you. Please have a seat.
- A person may prefer oral directions of where the interview is to be conducted and the physical location of a chair, or they may prefer to take your arm and be escorted to the chair. Always allow the person to take your arm, do not grab the person. When you have reached the chair, put the person’s hand in contact with the back of the chair. A verbal cue is also helpful.
- Point out obvious obstacles to avoid in a calm and respectful manner.

*Notes*

- Do not raise your voice. A person with a visual impairment does not necessarily have a hearing impairment.
- Let the person know if you move or need to end the conversation. Also tell them when someone else has entered the room.
- Inform the person of the possibility of providing auxiliary aids to facilitate their equal access to the required program information. Have tapes and/or materials in Braille available.

***Interviewing People with Speech Impairments***

- Give your undivided attention when communicating with a person who has a speech impairment. Do not panic; often the more time you spend with the person, the more you are able to understand what they are saying. Continue to concentrate.
- Ask short questions that require short answers, such as a nod of the head.
- Do not pretend to understand if you do not. Try to rephrase what you wish to communicate, or ask the person to repeat what you do not understand.
- Do not raise your voice. Most speech impaired people have normal hearing.
- Stifle any urge to complete a sentence for the interviewee. Be patient and give reassuring eye contact and approving body language.



### ***Interviewing People Who Are Deaf or Hearing Impaired***

- If you need to attract the attention of a person who is deaf or hearing impaired, touch them lightly on the shoulder.
- If the interviewee reads lips, look directly at them. Speak clearly at a normal pace. Do not exaggerate your lip movements or shout. Speak expressively because the person will rely on your facial expressions, gestures and body movements to understand you. Maintain eye contact.
- Shouting does not help and can be detrimental. Raise your voice only when requested.
- Brief written notes may be helpful.
- In the US, most deaf people use American Sign Language (ASL). ASL is not a universal language. It is a language with its own syntax and grammatical structure. When scheduling an interpreter for a non-English speaking person, be certain to retain an interpreter that speaks and interprets in the language of that person. Asking that person for a referral is a good idea.
- If an interpreter is present, it is common for the interpreter to be seated beside the interviewer, across from the interviewee.
- Interpreters facilitate communication. They should not be consulted or regarded as a reference for the interviewee.

### ***Interviewing People with Mobility Aids***

- Enable people who use crutches, cane(s) or wheelchairs to keep them within reach.
- Be aware that some wheelchair users may choose to transfer themselves into an office chair for the duration of the interview.
- When speaking to a person in a wheelchair or on crutches for more than a few minutes, sit in a chair. Place yourself at that person's eye level to facilitate conversation.
- If there is no chair around, do not bend over at the waist with your hands on your knees like you would speak to a child. Squat or kneel down at that person's eye level.
- Do not touch the head of a person in a wheelchair or otherwise treat them in a manner you would not use with other adults.

### ***Interviewing People with Mental, Developmental, or Psychiatric Disabilities***

- This is a tremendously diverse population of people with a wide range of ability levels. It is important to treat each person as an individual and find what will work best for each one.
- Again, let the person with a disability take the lead in explaining what, if any, accommodations or changes in the regular format of the interview format they would like to make.
- It may be necessary to speak clearly and slowly and use shorter sentences and smaller words. You may be asked to repeat yourself.
- The person may prefer to have you orally explain the contents of the materials instead of simply giving them the materials to read.

*Notes*

- The person is not required to disclose that they have a disability. Nor should the housing officer ask any questions about the nature or extent of that disability unless it is solely for the purpose of finding what accommodation will work best for that person, once an accommodation is requested.
- If a part of a person's disability is to say potentially offensive things, or to make unwarranted accusations, it is important to stay calm.
- If a person is raising their voice or making gestures that give you cause to fear them, you should calmly but firmly state that the person needs to calm down so that you can better understand what their needs are.
- Don't further escalate the conflict by raising your voice or conveying any aggressive body language. It is acceptable for you to terminate an interview if the person's conduct is preventing the interview from proceeding.
- It is appropriate to try to accommodate the person so they have equal access to the program. However, if no accommodation is found to prevent abusive or threatening behavior, the person may not be eligible for the program.
- A person qualified for a program is one who can, with or without an accommodation, fulfill the essential requirements of the program. The annual recertification interview is one of the essential program requirements.
- However, disqualifying or terminating a disabled person is the very last step after all attempts to accommodate the person fail.

### WHAT YOU CANNOT ASK AN APPLICANT

- A housing agency can ask only for information that is relevant to whether the applicant qualifies for the program.
- The general rule is that you *cannot* ask:
  - If a person has a disability
  - The nature or extent of the disability
  - Any question that would require the disabled person to waive or disclose a medical condition or history
  - Whether any family member has a disability.
- It is always the right of a person with disabilities to not say anything about their disabilities. That is the person's choice and should be respected; however, the housing agency does not have to provide any accommodation or special preference for that person and may terminate their assistance for family violations without violating fair housing laws.
- There are some exceptions to this rule for the administration of the HCV program.

## WHAT YOU CAN ASK

- *If a person is applying for housing designated for individuals with disabilities or a certain type of disability, you may ask if the applicant has a qualifying disability and for verification of that disability.*
- *If the person is trying to qualify for allowances that reduce their rent on the basis of a disability (such as the \$400 allowance for elderly and disabled families, the allowance for unreimbursed medical expenses, or the handicap assistance allowance) you may ask the person to verify a disability (and disability related expenses when relevant).*
- Federal regulations prohibit the PHA from admitting a household member whose illegal drug use or pattern of alcohol abuse indicates the person will interfere with the health and safety of other residents.
- If the question is asked of all participants and applicants, staff may inquire as to whether any household member is currently using illegal drugs or abusing alcohol in such a way as to interfere with the health and safety of other residents.
- However, it is impermissible to ask if any household members have a history of such activity, because it is inquiring into the nature and severity of a possible disability.
  - The exception is asking whether a family member has been evicted from assisted housing in the last three years for illegal drug activity.

Section 4: Non-discrimination in Customer Service

*Notes*

- If the participant requests an accommodation due to a particular disability, you may ask the person to verify they have a disability and the need for the requested accommodation.
- If, during the termination process, the person asserts the family violation was caused by the disability and that a reasonable accommodation would prevent future violations, the family may be asked to verify that:
  - The person has a disability
  - The violation was a result of that disability
  - The requested accommodation is reasonable and likely to cure the violation.

## **Section 5      Individual Working Styles**

### **LEARNING OUTCOMES**

- Upon completion of this section, you should be able to:
  - Recognize the importance of four basic individual working styles and how these style interact in being able to provide good customer service
- All customers (internal and external) fall into two categories: ones who think and behave similarly to you, and ones who don't.
- In your work environment there are probably persons who understand your needs and respond to them quickly, and likewise, you know what it will take to satisfy them in your working relationship.
- There are probably also those who often surprise you by what they say, puzzle you with their reactions and leave you uncertain how to react or to satisfy their work needs.
- The most successful service providers learn how to work with both groups, especially the ones who think and act differently than they do.

Section 5: Individual Working Styles

*Notes*

- Working styles measure two aspects of a person's behavior:
  1. How emotionally expressive they are. The degree to which a person shows or holds back emotions helps determine their style.
    - Verbal expression (Type of language, colorful, understated)
    - Vocal expression: (Fast, slow talker, intensity or calmness in voice)
    - Body language: (Talk with hands? Stay still and placid?)
    - Environment: (Work area)
  2. The degree to which they assert themselves. The degree by which a person tries to influence and control the actions and opinions of others. (forceful, easygoing)



## Section 5: Individual Working Styles

**Four Working Styles**

| <b>Analytic</b><br>Less Assertive & Less Responsive                                                                                                                                                                                                  | <b>Driver</b><br>More Assertive & Less Responsive                                                                                                                                                                                                                       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Responsive                      Logical<br>Well-organized              Factual<br>Serious                      Reserved<br>Systematic<br>Behaviors:<br>Little facial expression<br>Controlled body movement<br>Little inflection<br>Precise language | Decisive                      Intense<br>Independent                      Deliberate<br>Efficient                      Achieving<br>Behaviors:<br>Direct eye contact<br>Move quickly with purpose<br>Speak forcefully/directly                                          |
| <b>Amiable</b><br>Less Assertive & More Responsive                                                                                                                                                                                                   | <b>Expressive</b><br>More Assertive & More Responsive                                                                                                                                                                                                                   |
| Cooperative                      Patient<br>Friendly                      Relaxed<br>Supportive<br>Behaviors:<br>Friendly facial expression<br>Frequent eye contact<br>Speak slowly/soft tones<br>Supportive language                                | Outgoing                      Humorous<br>Enthusiastic                      Gregarious<br>Persuasive                      Lively<br>Behaviors:<br>Rapid hand/arm gestures<br>Speak with animation/inflection<br>Wide range of facial expressions<br>Persuasive language |

## Notes

- How do the four styles interact? Here are some examples.
- 1. **Amiable and Driver:** In this scenario, the housing specialist has an amiable working style and the applicant has the driver working style.
  - *Housing Specialist: (with a pleasant tone)* Good afternoon, how are you today?
  - *Applicant:* Fine, I want to apply for housing assistance. Do you have an application?
  - *Housing Specialist:* I sure do. By the way, how long have you lived in the area?
  - *Applicant: (impatiently)* A long time. Can I have the application form?
  - *Housing Specialist: (Looking in filing cabinet)* You know, somebody's always taking the application folder. Why don't you have a seat and look at one of our brochures and let me see if I can find you an application? It shouldn't take long.
  - *Applicant:* I don't have time to read a brochure, do you have it or not?
  - *Housing Specialist:* Oh, here it is! Would you like a clipboard, or do you want to fill it out at the counter, or do you want to mail it in?
  - *Applicant:* I just want the application.
- "DRIVERS WANT SPEEDY RESULTS... NOT SMALL TALK"

Section 5: Individual Working Styles

Notes

2. **Analytical and Amiable:** In this example, the housing specialist is an analytical and the owner is an amiable.
- *Housing specialist:* Can I help you?
  - *Owner:* Well, I've got some forms to turn in here so I can get an inspection done. Do you do the inspections?
  - *Housing specialist: (matter-of-factly)* Let me see the forms. (Reviews them) These forms are not complete. What is the exact spelling of your last name and your street address as well as your mailing address?
  - *Owner: (smiling)* I'm really sorry. Hey, look I'll be glad to sit over here and fill them out. I'm not in a hurry. In fact, if you're busy I can bring them back later.
  - *Housing Specialist:* What time will you be back?
- "THE DETAILS THAT ARE SO IMPORTANT TO THE ANALYTIC ARE NOT IMPORTANT TO THE AMIABLE"

3. ***Expressive and Analytical:*** In this example the housing specialist has the expressive working style and the owner has the analytical working style.
- *Housing specialist:* Good morning. What a great day! Can I help you?
  - *Owner:* I want to schedule an inspection. Here are the papers. My name is Wynkler. That's W Y N K L E R, with a Y, not an I. Do you want to write it down?
  - *Housing specialist:* I know what you mean, people misspell my name all the time and my name is simple. It's Elston, with one L but people always spell it with 2 L's.
  - *Owner:* Can we get this scheduled for Thursday, and how long will the inspection take?
  - *Housing Specialist:* Well it depends on the availability of inspectors for that day. As for the inspection itself it will depend on how many bedrooms and the over-all condition of the unit. Is it in pretty good shape?
  - *Owner: (impatiently)* Look, I've got another appointment. Can you schedule the inspection?
- "ANALYTICALS WANT THE FACTS, THE DETAILS"

4. **Driver and expressive.** In this example the Housing specialist has the driver working style and the owner has the expressive working style.
- *Housing specialist:* Can I help you?
  - *Owner: (enthusiastically)* Hi! How are you? I'm Bob Winkler, what was your name?
  - *Housing specialist:* It's Merkyl Fernbaugh. How can I help you?
  - *Owner:* Great name! I've got some papers to schedule an inspection. It's a really nice mobile home and I've put a lot of TLC into it. It'll probably pass, don't you think?
  - *Housing specialist: (looking at his watch)* That's up to the inspectors. Give me the papers, and I'll log it in.
  - *Owner:* I'll bet you people do a ton of inspections, don't you. Look, I'm going to make a phone call while you do that. I'll be back in a few minutes.
  - *Housing specialist:* No, don't do that. It won't take that long to log it in, then you can go.
- "EXPRESSIVES ARE GREGARIOUS AND FOCUS ON GENERALITIES"

Section 5: Individual Working Styles

Notes

## Section 6      Customer Service Policy/Plan

Notes

### LEARNING OUTCOMES

- Upon completion of this section, you should be able to:
  - Apply knowledge of customer service to develop written customer service policies and procedures
- Talking about customer service does not make it happen. As stated earlier, customer service is a *choice* that involves planning and action.
- We are suggesting here that you transform the desire to perform quality customer service into a written policies and procedures.
- Then there will be no misunderstanding about management's commitment to good customer service or the expectation that it be provided.

## **Exhibit**

### **ANYWHERE PHA CUSTOMER SERVICE POLICY**

The Anywhere PHA management and staff are committed to deliver high quality customer service to the community. We consider our customers to be all persons who have an interest in or utilize our services including all other service agencies, the general public, local government, and the Department of Housing and Urban Development.

This policy sets forth the standards for the delivery of service and includes quality assurance practices for the ongoing evaluation of total agency performance.

#### **IDENTIFYING SERVICE VULNERABILITIES**

- The PHA will perform periodic **(define)** satisfaction surveys of participating owners and families to identify areas where services can be improved.
- Satisfaction surveys will be sent to families and owners who terminate their participation in the program.
- Coordination and cooperation between different **(departments)** **(functions)** will be a standing item on the PHA meeting agenda.
- The **(position)** will be responsible to identify communication and cooperation problems between the various (departments) (functions).
- Any staff person receiving an oral or written complaint must document the complaint and the manner in which it was resolved and forward a copy to the appropriate supervisor.
- All letters received by the PHA that comment on the quality of service will be forwarded to **(position)**.
- All requests for reasonable accommodation will be referred to **(position)**

#### **SERVICE PERFORMANCE STANDARDS**

##### **Telephone standards**

- Calls should be answered within **(number)** rings
- When accepting outside calls:
  - Greet the caller, (Good morning, afternoon)
  - State the name of the PHA
  - State your name, and
  - Ask how you may assist the caller
- Direct line internal calls:
  - Hello, this is \_\_\_\_\_ speaking, how may I help you?
- If you are answering for a department, state the name of the department after your greeting



### **Putting a caller on hold**

- Ask if you may put the caller on hold
  - Wait for a response (allow the caller to choose if they want to wait)
  - Tell the caller why they are being put on hold
  - Give the caller a time frame
  - Thank caller for holding after returning to line

### **Transferring a call**

- Explain why the caller is being transferred
- Ask the caller if he or she minds being transferred
- Make sure someone picks up the call before you hang up
- Tell the person to whom you are transferring the call the caller's name and the nature of the call (if known)

### **Taking a message**

- Inform the caller of the availability of the person they want to talk to before - asking their name
  - Give an estimated time of your co-workers return
  - Offer to help the person yourself if you are able or transfer to another party if available
  - If taking a written message, print name, number, and extension and message clearly

### **Returning telephone calls**

- Calls received before noon should be returned at the first available opportunity and not later than the end of the business day that they were received. If a call is received after 12:00 and cannot be returned by the end of the business day, it should be returned by 12:00 noon the following working day.

### **Walk-ins**

- The **(position)** is responsible to greet all persons entering the agency in a friendly and professional manner. Any person in the lobby or common area should also greet persons entering the building or common areas.
- If the **(position)** is not available any staff person in the area should greet persons in the lobby or common area and ask if they have been assisted.
- All staff should greet visitors to the PHA premises in a friendly and professional manner

### **Written correspondence**

- All written correspondence to the PHA, including letters, forms, and verification documents, should be date and time-stamped. A written response should be made within (number) working days of receipt of the correspondence if the correspondence is a letter that requires information or service from the PHA.
- Copies of all written responses to correspondence should be placed in the appropriate family or administrative file.

### **Interviews and other appointments**

- All staff who schedule appointments with program clients should keep a desk calendar on which appointments are logged at the time they are scheduled.
- Staff should go to the lobby or common area to greet clients and escort them to interview area punctually.
- When interviews are being conducted, all staff will make every effort to minimize noise and other distractions.
- Staff will not be interrupted by telephone calls during interviews, but check for and return calls promptly at the end of each interview.
- Voice mail should be cleaned out daily.
- Staff will ensure that the interview area is neat and professional, and that there are not family files, data, or documents in plain view.

### **Inspections**

- Written notification of inspections will be mailed at least (number of days) prior to the inspection to both the owner and the family.
- The PHA will make every attempt to accommodate working families to minimize time missed at work
- In HCV, initial inspections will be scheduled and performed within (number) days of the receipt of a Request For Tenancy Approval and proposed lease.
- In HCV, for all inspections, if repairs are not made at the time of the reinspection, (position) will contact the owner by telephone immediately in order to determine the owner's intentions.

### **Program Rule-Violations (HCV)**

- In cases when the PHA discovers fraud or any other program violation on the part of a family or an owner, the staff will maintain the same high standards of professionalism accorded to all families and owners.
- Families will be contacted and given an opportunity to explain their actions before a decision is made to terminate assistance.
- Families will be provided an opportunity to disagree with any PHA decision to terminate and given the opportunity for an informal hearing.

**Program Rules and Lease Violations (Public Housing)**

- When the PHA discovers fraud or any other program violation on the part of a resident, the staff will maintain the same high standards of professionalism accorded to all families when dealing with that resident.
- Families will be contacted and given an opportunity to explain their actions before a decision is made to terminate tenancy.
- Families will be provided an opportunity to disagree with any PHA decision to terminate tenancy and given the opportunity to request a hearing.

**Internal Customers**

- All PHA personnel are expected to provide prompt and professional service to co-workers both inside and outside of their department. The flow chart below depicts the functional relationships (and accountabilities) within and between departments.

**Functional Flow Chart of Internal Customers**

*Insert Organization Chart here*

**Conflict arbitration and resolution**

- In the event that there is a conflict between co-workers that cannot be resolved, the conflict will be arbitrated by **(position)**

**Reports and production due-dates**

- The following reports are due promptly on the dates indicated

(Name) Report

| From     | To       | Due Date |
|----------|----------|----------|
| Position | Position |          |
| Position | Position |          |
| Position | Position |          |
| Position | Position |          |
| Position | Position |          |

### **New Employee Orientations**

- All new employees must attend a customer service orientation to be provided by **(position)**

### **Performance Evaluations**

- In addition to job production standards, the quality of customer service demonstrated by employees will be a material consideration as a part of performance evaluations.

### **Security of files and family data**

- All family data and files are to be kept **(location)**
- Files can only be removed from the file storage area after being signed for by a staff person. The sign out log must include the business reason that the file was removed.
- Files must be returned to the file storage area immediately after each use.
- If files must be kept in a location other than the file storage area, they must be secured in a locked file cabinet in that location when not being used.
- Criminal background reports will be destroyed within **(number of days)** of the date of admission or the date of the informal review, if admission is denied based upon a criminal report.
- Credit bureau inquiries will be destroyed within **(number of days)** after they have served the purpose for which they were obtained.
- All discussion of family file data among staff is limited to business reasons.

### **Procedures for dealing with abusive or threatening behavior**

- If any person on the premises demonstrates behavior that is abusive or threatening, the staff person who is the subject of the behavior should contact **(position)** immediately.

### **HCV Owners**

- PHA obligations to inform owners.
- The PHA will conduct **(Annual, semi-annual)** owner workshops to inform owners of program rules and to problem-solve relevant owner issues.
- The PHA will promptly inform all participating owners of changes in HUD requirements or local policies that affect them.
- The PHA will publish a **(monthly, quarterly)** newsletter to be included with the HAP payment to all HCV owners who participate in the program.
- Complaints and questions from owners will be kept in a log by **(position)**
- The most common complaints and problems experienced by owners will be published in the PHA **(quarterly, monthly)** newsletter to owners.
- The PHA will consult with the owner advisory committee to discuss changes in regulations or procedures pertaining to owners.

### **Performance Standards (Public Housing)**

- Work orders and performance of maintenance:
  - The systems for the reporting and performance of maintenance and repairs vary among PHAs, and we are making no assumptions about your system. What we are suggesting here is the specific standards be developed to ensure timely communication and cooperation between the maintenance function and the housing management function.
- The performance standard for non-emergency repairs is (time period) from the date of notification.
- Maintenance must notify the housing manager of the completion of a work order within/no later than (\_\_\_\_\_).

### **Safety and Security (Public Housing)**

- Any condition found anywhere on the PHA property that could potentially result in harm or injury to a person must be reported to the (position) immediately.
- Any suspicious persons or persons participating in disruptive or criminal behavior must be reported to (position) immediately.

Section 6: Customer Service Policy/Plan

Notes

## Section 7      Learning Activities

### STYLE SELF-EVALUATION QUESTIONNAIRE

- There are no *correct* or *incorrect* answers to these questions. Base your answers on how you are today, not how you think you should be or would like to be in the future. Select one answer for each question.

1. When talking to a client or co-worker...
  - a. I maintain eye contact the whole time
  - b. I alternate between looking at the person and looking down
  - c. I look around the room a good deal of the time
  - d. I try to maintain eye contact but look away from time to time
2. If I have an important decision to make...
  - a. I think it through completely before deciding
  - b. I go with my gut instincts
  - c. I consider the impact it will have on other people before deciding
  - d. I run it by someone whose opinion I respect before deciding
3. My office or work area mostly has...
  - a. Family photos and sentimental items displayed
  - b. Inspirational posters, awards, and art displayed
  - c. Graphs and charts displayed
  - d. Calendars and project outlines displayed
4. If I am having a conflict with an owner, a client, or a co-worker...
  - a. I try to help the situation along by focusing on the positive
  - b. I stay calm and try to understand the cause of the conflict
  - c. I try to avoid discussing the issue causing the conflict
  - d. I confront it right away so that it can get resolved as soon as possible
5. When I talk on the phone at work...
  - a. I keep the conversation focused on the purpose of the call
  - b. I will spend a few minutes chatting before getting down to business
  - c. I am in no hurry to get off the phone and don't mind chatting about personal things, the weather, and so on.
  - d. I try to keep the conversation as brief as possible
6. If a co-worker is upset...
  - a. I ask if I can do anything to help
  - b. I leave him alone because I don't want to intrude on his privacy
  - c. I try to cheer him up and help him to see the bright side
  - d. I feel uncomfortable and hope he gets over it soon

Section 7: Learning Activities

7. When I attend meetings at work...
  - a. I sit back and think about what is being said before offering my opinion
  - b. I put all my cards on the table so my opinion is well known
  - c. I express my opinion enthusiastically, but listen to other's ideas as well
  - d. I try to support the ideas of the other people in the meeting
8. When I make a presentation in front of a group...
  - a. I am entertaining and often humorous
  - b. I am clear and concise
  - c. I speak relatively quietly
  - d. I am direct, specific, and sometimes loud
9. When a client is explaining a problem to me...
  - a. I try to understand and empathize with how she is feeling
  - b. I look for the specific facts pertaining to the situation
  - c. Listen carefully for the main issue so that I can find a solution
  - d. I use my body language and tone of voice to show her that I understand
10. When I attend training programs or presentations...
  - a. I get bored if the person moves too slowly
  - b. I try to be supportive of the speaker, knowing how hard the job is
  - c. I want it to be entertaining as well as informative
  - d. I look for the logic behind what the speaker is saying
11. When I want to get my point across to a client or a co-worker...
  - a. I listen to their point of view first and then express my ideas gently
  - b. I strongly state my opinion so that they know where I stand
  - c. I try to persuade them without being too forceful
  - d. I explain the thinking and logic behind what I'm saying
12. When I am late for a meeting or appointment...
  - a. I don't panic but call ahead to say that I will be a few minutes late
  - b. I feel bad about keeping the other person waiting
  - c. I get very upset and rush to get there as soon as possible
  - d. I apologize profusely once I arrive
13. I set goals and objectives at work that...
  - a. I think I can realistically attain
  - b. I feel are challenging and would be exciting to achieve
  - c. I need to achieve as part of a bigger objective
  - d. will make me feel good when I achieve them
14. When explaining a problem to a co-worker whom I need help from...
  - a. I explain the problem in as much detail as possible
  - b. I sometimes exaggerate to make my point
  - c. I try to explain how the problem makes me feel
  - d. I explain how I would like the problem to be solved



Section 7: Learning Activities

15. If clients or co-workers are late for a meeting with me in my office....
  - a. I keep myself busy by making phone calls or working until they arrive
  - b. I assume they were delayed a bit and don't get upset
  - c. I call to make sure that I have the correct information (date and time)
  - d. I get upset that the person is wasting my time
16. When I am behind on a project and feel pressure to get it done...
  - a. I make a list of everything I need to do, in what order, by when
  - b. I block out everything else and focus 100 percent on the work I need to do
  - c. I become anxious and have a hard time focusing on my work
  - d. I set a date to get the project done and go for it
17. When I feel verbally attacked by a client or a co-worker...
  - a. I tell her to stop
  - b. I feel hurt but usually don't say anything about it to her
  - c. I ignore her anger and try to focus on the facts of the situation
  - d. I let her know in strong terms that I don't like her behavior
18. When I see a client or co-worker whom I like and haven't seen recently...
  - a. I give them a friendly hug
  - b. I greet them but don't shake hands
  - c. I give them a firm but quick handshake
  - d. I give them an enthusiastic handshake that lasts a few moments

## Section 7: Learning Activities

**Scoring**

- You will be scoring yourself in four specific working style categories:
  - Driver
  - Expressive
  - Amiable
  - Analytical
- Circle your answers to the questions in the table below and add up the number of times you circled each style. The style with the most points is your primary working style.

|                                                              |                                                               |                                                               |
|--------------------------------------------------------------|---------------------------------------------------------------|---------------------------------------------------------------|
| 1. a. Driver<br>b. Amiable<br>c. Analytical<br>d. Expressive | 7. a. Analytical<br>b. Driver<br>c. Expressive<br>d. Amiable  | 13. a. Analytical<br>b. Expressive<br>c. Driver<br>d. Amiable |
| 2. a. Analytical<br>b. Driver<br>c. Amiable<br>d. Expressive | 8. a. Expressive<br>b. Analytical<br>c. Amiable<br>d. Driver  | 14. a. Analytical<br>b. Expressive<br>c. Amiable<br>d. Driver |
| 3. a. Amiable<br>b. Expressive<br>c. Analytical<br>d. Driver | 9. a. Amiable<br>b. Analytical<br>c. Driver<br>d. Expressive  | 15. a. Expressive<br>b. Amiable<br>c. Analytical<br>d. Driver |
| 4. a. Expressive<br>b. Amiable<br>c. Analytical<br>d. Driver | 10. a. Driver<br>b. Amiable<br>c. Expressive<br>d. Analytical | 16. a. Analytical<br>b. Driver<br>c. Amiable<br>d. Expressive |
| 5. a. Driver<br>b. Expressive<br>c. Amiable<br>d. Analytical | 11. a. Amiable<br>b. Driver<br>c. Expressive<br>d. Analytical | 17. a. Driver<br>b. Amiable<br>c. Analytical<br>d. Expressive |
| 6. a. Amiable<br>b. Analytical<br>c. Expressive<br>d. Driver | 12. a. Analytical<br>b. Amiable<br>c. Driver<br>d. Expressive | 18. a. Amiable<br>b. Analytical<br>c. Driver<br>d. Expressive |

**Total Driver Score** \_\_\_\_\_

**Total Analytical Score** \_\_\_\_\_

**Total Amiable Score** \_\_\_\_\_

**Total Expressive Score** \_\_\_\_\_

### Instructions:

- [illegible]

**CUSTOMER SERVICE ACTION PLAN**

- List all functions for which your rating is 1 or 2 in their order of importance.  
(Which ones do you want to get to first?)

**Areas to work on:**

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## Section 7: Learning Activities

**ACTION WORKSHEET**

| <b>Job Function - Goal #1:</b>                                                                                                                                                |             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
|                                                                                                                                                                               |             |
| <b>Action Steps:</b><br>(List and describe the steps you will take to improve your customer performance for this job function, and the date by which you will accomplish it). |             |
| <b>STEP 1:</b>                                                                                                                                                                | <b>Date</b> |
|                                                                                                                                                                               |             |
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|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
| <b>STEP 2:</b>                                                                                                                                                                | <b>Date</b> |
|                                                                                                                                                                               |             |
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|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
| <b>STEP 3:</b>                                                                                                                                                                | <b>Date</b> |
|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
| <b>STEP 4:</b>                                                                                                                                                                | <b>Date</b> |
|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |
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|                                                                                                                                                                               |             |
|                                                                                                                                                                               |             |

## HOUSING AGENCY EVALUATION

- Use the following numbers to evaluate each question:

**0 = Not at all      1 = To a small degree      2 = To a moderate degree      3 = To a large degree**

\_\_\_\_\_ Do we survey program clients and owners to find out how satisfied they are with our service and ask for suggestions for improvements?

\_\_\_\_\_ Do we survey our staff to find out how satisfied they are with the working environment and ask for their suggestions for improvements?

\_\_\_\_\_ Do we have a written mission statement or specific long range goals that focus on our commitment to providing our clients with quality services?

\_\_\_\_\_ Do we collect information on what poor quality and service costs our agencies in terms of bad will, wasted time and reduced morale?

\_\_\_\_\_ Do we train our front-line staff in telephone and face-to-face customer relations skills?

\_\_\_\_\_ Do we train managers in the skills needed to support staff in providing excellent service? (Team building, delegation, coaching, etc.)

\_\_\_\_\_ Do we put newly hired staff through an orientation process that stresses the importance of client service in their specific job?

\_\_\_\_\_ Do we have a computer system that supports our staff in providing fast and efficient performance?

\_\_\_\_\_ Do we have a process in place that allows us to make specific changes in our policies and procedures based on customer feedback?

\_\_\_\_\_ Do we go out of our way to reward and recognize staff for their efforts on behalf of program customers and the community?

***Total***

### Scoring:

|                  |                |                                  |
|------------------|----------------|----------------------------------|
| 25 to 30 points: | Platinum level | You've got it going on!          |
| 18 to 24 points: | Gold level     | You're hitting on all cylinders! |
| 10 to 17 points: | Bronze level   | Time for a tune-up               |
| 0 to 9 points:   | Copper level   | Get a grip before you crash!     |

Section 7: Learning Activities

**SAMPLE OWNER SURVEY**

- Rate the PHA from 1 to 5 in the following areas, with one (1) being poor and five (5) excellent. *(If you desire, you may make comments below)*

- \_\_\_ Friendliness of personnel
- \_\_\_ Competence of personnel
- \_\_\_ Timely response to telephone calls
- \_\_\_ Timely response to letters
- \_\_\_ Explanation of HUD and housing agency rules
- \_\_\_ Timeliness of HAP payments
- \_\_\_ Quality and consistency of housing quality inspections
- \_\_\_ Willingness to answer questions

Section 7: Learning Activities

Notes