

NCSHA 2008 Awards Entry Description

Entry Name: Teambuilding through Client Surveys
Category Name: Management Innovations: Operations
HFA: Washington State Housing Finance Commission (WSHFC)

In May 2007, the Washington State Housing Finance Commission's Board asked its Executive Management Team how satisfied the Commission's key clients and partners are with the overall performance of the Commission. The Executive Management Team used this question as an opportunity to engage WSHFC staff in conducting a client satisfaction survey as its 2007-2008 team project. (Each year, non-clerical WSHFC staff work together on a team goal.) The Client Satisfaction Survey project was envisioned as a way to gather feedback from clients and stakeholders and it succeeded in this goal. More importantly; however, the project became an invaluable teambuilding exercise and staff development tool. WSHFC staff conducted 103 interviews with stakeholders between November 2007 and February 2008. Most interviews were held offsite and in person, with a few held via telephone when distance was a factor. The project paired staff from different divisions who interviewed clients who generally worked outside of the interviewers' divisions. Employees expanded their interaction with fellow staff and WSHFC stakeholders, learned to work together in teams, and increased their exposure to the variety of business WSHFC is involved in across the state.

Cross-Divisional Appreciation

WSHFC has 6 divisions: Administration, Finance, Tax Credits, Homeownership, Compliance and Capital Projects (Tax-exempt Bonds). Some staff from some divisions work together regularly, while others have little exposure to what happens outside of their own division. This project was designed to maximize cross-divisional interaction and education. Staff members were divided into teams of two, using the guiding principle that teams had to consist of staff from two different divisions. This allowed staff members to work with people they do not interact with on a regular basis. Also, each division was asked to submit the names of 50 key stakeholders to create the interviewee pool. As much as was possible, the Interview Teams were assigned stakeholders that their divisions do not work with regularly. This allowed Interview Teams to speak with clients they did not know and to learn about the impact of work being done by other parts of the agency.

Teambuilding

WSHFC highly values working as a team, so much so the word is included in our Mission Statement: *We are a publicly accountable, self-supporting team dedicated to increasing housing access and affordability and to expanding the availability of quality community services for the people of Washington.* Our Vision Statement strengthens this with the self-view of WSHFC being *a catalyst to join resources and partnerships.* Finally, the first word in our statement of core values is *teamwork.* Over the course of the project, several different teams were created from all divisions and levels of professional staff to execute various parts of the process. The Administrative Team developed the survey questionnaire and managed the project; Interview Teams scheduled and conducted the in person interviews; and the Review Team managed data collection, synthesis and the drafting of the final report. Each of these teams required people who do not normally work together to collaborate towards a common end. The success (and bonus compensation) of the goal depended upon each staff member's participation and their working with others toward the completion of the project on a strict timeline. Staff held each other accountable, but also worked together to help when surges in regular workloads required some to spend less time working on the team project.

At the end of the project, a survey was taken of the staff who participated in the interview process. Most everyone (87%) valued being paired with someone from another division and enjoyed the interaction.

Teambuilding through Client Surveys – WSHFC

Staff Development

The Client Satisfaction Survey was useful not only as a teambuilding tool, but also as a way WSHFC could further its commitment to developing managerial excellence. The project broadened and refined staff knowledge, skills, and abilities critical for effective management and leadership performance. For many of the staff, especially those whose duties do not involve client contact, this project forced them to go outside of their comfort zone to engage clients they did not know. In addition, staff was put in the position of representing WSHFC in unfamiliar circumstances and situations. Not knowing all aspects of the agency's many programs and activities, they learned from interacting with the clients and each other. To increase staff comfort with the process, there was a kickoff meeting conducted by the Administrative and Review Teams. The meeting consisted of presentations on best practices for conducting interviews, role playing with the survey questions, telephone scripts to help set up interviews and explain the purpose of the project, and the process for reporting the interview results. In the true spirit of teamwork, staff was actively engaged in offering ideas and solutions to facilitate the processes during the Kick-off Meeting.

By working with and interviewing clients, staff also developed greater knowledge of stakeholders and their respective areas of expertise. The information gathered in the interviews is helping WSHFC respond better to clients needs and better prepare for changes in the industry, and will continue to be a resource for the foreseeable future.

Judging Criteria

Innovative

A typical way to assess client satisfaction might be to send out an electronic survey or to outsource the entire project to a survey firm. Instead, WSHFC took the opportunity to personalize the process by involving its staff in face to face contact with clients. The project also provided platform for teambuilding and education of staff about areas of the agency with which they are unfamiliar.

Replicable

The Client Satisfaction Survey process is documented and easily replicable at other HFA's. The survey instrument can be used as a jumping off point for developing questions that meet the needs of the specific HFA.

Respond to Management Challenge or Opportunity

The survey project was in direct response to the Board of WSHFC requesting to know how well WSHFC is serving its clients. WSHFC took this challenge as an opportunity to engage staff in collecting client feedback. This in turn became an opportunity for staff development as well as a way WSHFC could learn how it can better respond to its clients' needs.

Achieve Measurable Improvements in Agency Operations

In the survey of staff who participated in interviews, the project was rated 4.3 on a scale of 5 as a positive experience. In addition, it is clear that the cross-training education achieved by this exercise raised the baseline understanding among all WSHFC employees of the WSHFC business. This increased knowledge translates into better and more efficient customer service across the agency.

Provide Benefits that Outweigh Costs

The benefits of increasing collective and cross-divisional understanding of WSHFC's business greatly outweighed the costs of this project. This project proved to be an excellent staff development tool worth every bit of the time staff dedicated to it. Staff increased their knowledge of WSHFC's business both from each other and from their interaction with clients. Client feedback has also provided the leadership team with new opportunities for program and process improvements.

Teambuilding through Client Surveys – WSHFC

Demonstrate Effective Use of Resources

WSHFC decided to use internal resources to complete a project that would have been expensive to outsource. Further, WSHFC intentionally did not budget for the travel portion of this project, but instead challenged staff to find ways to incorporate their interviews into existing business. For clients outside of the Seattle area, staff incorporated interviews into existing travel by the employee or the client. For the few clients in locations where meeting in-person was impossible, staff conducted a few telephone interviews. The net effect was that WSHFC was able to absorb all of the costs of this project.

Achieve Strategic Objectives

For reasons mentioned above, this project achieves two objectives stated in WSHFC's Five-Year Strategic Plan 2004 – 2009: 1) to foster a proactive environment that encourages innovation, problem solving, conflict resolution and open communication and 2) teambuilding and a commitment to the development of managerial excellence.

Finally, as evidenced from the client feedback, staff also had the opportunity to create client goodwill, appreciation, and trust. These are success factors in their own right; however, now staff has the hands-on experience of participating in that success.