

**BOARD ACTION REQUIRED**  
**October 17, 2013**

**ITEM:** Customer/Constituent Feedback System

**ACTION REQUIRED:** Board approval to formally adopt a systematic, agency-wide policy and process to collect, assess, act upon, and trend client and constituent feedback regarding agency programs and services.

**SUMMARY NARRATIVE:**

Community Action Agencies (CAAs) are tasked with understanding the voices of customers, constituents and stakeholders in the community. Relationships are an integral part of an overall listening and learning strategy. To meet the Pathways to Excellence Standard 3.2, CAPSLO must develop and implement an agency-wide policy and process to systematically collect, assess, and act upon customer/constituent feedback from customers about agency programs and services. The agency must also systematically track and produce formal reports using trends and comparative customer/constituent feedback data that provide evidence of a high degree of satisfaction among low-income customers, partners/stakeholders, investors/funders, and the community. Customer driven excellence is the outcome of this process.

A standardized client survey has been developed and an annual calendar set for each program to administer the survey to their clients during a pre-designated month of each year. In some cases, an additional program-specific survey will be attached. The survey is available in English and Spanish.

Results will be reviewed by the Board Planning Committee and reported to the full Board, at minimum, once yearly with any recommendations made at that time.

**BUDGET/FINANCIAL IMPACT:**

\$1,800 in the first year for formatting, printing and reporting all client surveys. This includes the printing of 9,200 surveys for one year. These costs should diminish slightly in the following years due to an existing design.

**STAFF RECOMMENDATION:**

Recommend approval. It is very important that the agency have a systematic, agency-wide process to collect, assess, and act upon customer/constituent feedback for continuous agency and program improvement.

**CHIEF EXECUTIVE OFFICER'S RECOMMENDATION:**

Recommend approval. Having an opportunity to learn from those we serve on a more systematic basis will enable the agency to make more strategic decisions regarding future program development and improvement.

## Community Action Partnership of San Luis Obispo County Employee Council

### ***Employee Council Overview/Purpose***

Two years ago the organization embarked upon the *Pathways to Excellence* process – a rigorous self-assessment aimed at identifying areas in which the organization could improve in order to better serve the community. One of the areas identified in both the self-assessment process as well as the last Strategic Plan employee survey was that greater communication was needed at all levels of the organization. Active employee participation in communicating, planning, and decision-making is an important element in helping the agency to bring about greater efficiency, accountability, and ultimately, excellence. The Employee Council will be comprised of fifteen, non-senior management staff who would advise and share ways with leadership and senior managers on how services can be improved. The Employee Council will review pertinent data and results from various programs and provide input and recommendations on how to improve program services.

***Employees can nominate either themselves or another employee.*** Information and a nomination form for the Employee Council are attached.

### ***Who Should Apply***

CAPSLO is seeking regular and seasonal employees with at least two (2) years of continuous employment. Seasonal employees who do not work year round are encouraged to apply. We are seeking a cross representation of employees across Agency departments, programs and locations. Ideal applicants are those who wish to take on leadership roles within the organization at various levels and/or have already done so. Applicants must be willing to commit the time needed (from 2 – 4 hours per month depending upon the issue(s) from November 2013 to November 2014 and to complete team and reflective assignments outside of meeting dates. Employees selected for the Employee Council will be paid for dates that fall outside their normal work season/schedule. Applicants should be team oriented with a desire to make this a successful experience for themselves and their fellow participants, and to make contributions to achieve Agency excellence in programs and operations.

### ***Selection Criteria***

Minimum criteria for selection:

- Commitment to the vision and mission of CAPSLO
- Standard Performance Evaluation (satisfactory and above) on file within the last year
- Follow CAPSLO and program confidentiality policies concerning information about children, families, clients, and other staff members
- Supervisor/Program Director approval in the CAPSLO Employee Council

Desired attributes:

- Willingness to take on leadership roles and/or demonstration of leadership ability
- Strong interpersonal and communication skills
- Involvement in Agency committees, programs or services over and above your primary work assignment/job
- Involvement in civic or community activities

**Final selection of candidates will be made by the Executive Leadership Team.**

**Proposed Timeline and Activities**

Monday, October 14, 2013	Application Submission/Nominations Deadline
October/November 2013	Review/Selection/Notification of Applicants
November/December 2013	Employee Council Training
January – November 2014	Employee Council meetings

**2014 Meeting Calendar**

While some dates are still firming up, the Employee Council will meet once per month, January through November. Meeting dates and times to be determined at a later date. Video conferencing and conference calls will be made available, as appropriate, to accommodate those staff outside of the San Luis Obispo County area.

**Application Instructions—Submission deadline: 12 noon, Monday, October 14, 2013**

Please do one of the following:

A. Hit “reply,” directing your response to Thomas Alvarez, HR Director. Complete the form below, including your leadership experience, references and responses to three reflection statements.

**OR**

B. Copy and paste the form below into a word doc. Respond to all information requested, and send the document as an attachment to [talvarez@capslo.org](mailto:talvarez@capslo.org)

Before you are accepted into the program, approval of your participation will be required by your supervisor and program director.

**Additional Information**

For additional information, contact Tom Alvarez, HR Director, at [talvarez@capslo.org](mailto:talvarez@capslo.org) or Grace McIntosh, Deputy Director, at [gmcintosh@capslo.org](mailto:gmcintosh@capslo.org).

**Community Action Partnership of San Luis Obispo County  
Employee Council  
Application**

**Submission deadline:**

***Candidate Information***

Name of Candidate:	E-mail address:
Title:	Cell phone:
Program:	Work location/Department:
Supervisor's Name:	Program Director's Name:
Date of Hire:	Hours/Week Worked:

1. Why are you interested in joining the Employee Council and what do you hope to gain from the experience?
2. What professional experience, training, or insights can you contribute to the Employee Council that will help improve agency programs and operations?
3. In terms of your leadership skills, please list three of your strengths and weaknesses.

<b>Strengths:</b>
1.
2.
3.
<b>Weaknesses:</b>
1.
2.
3.

4. Please share a challenging situation or project where you demonstrated leadership. Describe your strengths and any results, successes, and lessons learned.



**Presentation Pre-Test**

Please choose a code you can remember and enter it here (combo birthdate/initials) \_\_\_\_\_

Please answer the following questions:

List 3 ways you currently gather information on what your customers value.	1	
	2	
	3	
List 3 ways you currently gather customer satisfaction data	1	
	2	
	3	
List 2 ways low-income customers currently have to provide information to your board of directors.	1	
	2	
Please list those advisory groups your CAA has that have low-income consumers as members. As opposed to those groups that represent the issues impacting low income consumers.	1	
	2	
	3	
	4	
	5	

### Presentation Post-Test and Session Evaluation

Please enter the code from the pre-test and enter it here \_\_\_\_\_

After participating in today's session, please answer the following questions:

List 3 ways you may consider gathering information on what your customers value.	1	
	2	
	3	
List 3 ways you may consider gathering customer satisfaction data	1	
	2	
	3	
List 2 ways low-income customers may be able to provide information to your board of directors in the future.	1	
	2	
Please list advisory groups that you may consider developing that have low-income consumers as participants/members.	1	
	2	
	3	
	4	
	5	

Please answer the following question using this scale:

**1-Strongly Agree      2-Agree      3-No Opinion      4-Disagree      5-Strongly Disagree**

- \_\_\_\_\_ 1. The workshop met my expectations
- \_\_\_\_\_ 2. The presenters were knowledgeable about Customer Input.
- \_\_\_\_\_ 3. The presenters' style made it easy to learn.
- \_\_\_\_\_ 4. I left the presentation with at least 3 methods to assess what low-income customers value.
- \_\_\_\_\_ 5. I left the presentation with at least 3 methods I can use to gather customer satisfaction data
- \_\_\_\_\_ 6. I left the presentation with ways low-income consumers can recommend issues to our agency's board of directors
- \_\_\_\_\_ 7. The small groups were useful in helping me develop a plan of action to move forward.

## Small Group Discussion 1

1. What *methods* will you use to obtain input on what your customers value?

2. What *steps* need to take place to develop and implement these methods?



## Small Group Discussion 2

1. What *methods* will you use to collect and analyze customer satisfaction data agency-wide?
2. What *steps* need to take place to develop and implement these methods?

### **Small Group Discussion 3**

1. What *steps* need to take place for your CAA to form groups of low-income consumers that can recommend issues to your CAA's board of directors?