

THE AGENCY FOR CO-OPERATIVE HOUSING

POLICY MANUAL

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SUBJECT:

Client Service

The Agency is committed to a business model that is risk-based, data-driven and client-focused. Client-centred service is central to that model.

In administering co-op housing programs on behalf of CMHC, the Agency is committed to demonstrating leadership in serving all its stakeholders and client groups in a manner consistent with the ideals of the co-operative movement and the Agency's public accountability. The Agency's administration of programs will reflect a collaborative approach that recognizes an alignment of interests among co-ops, co-operative housing sector organizations, CMHC and the public. The interests of all these groups are well served when co-ops thrive. The Agency will significantly enhance previous levels of collaboration with co-ops, helping them to meet their objectives, comply with program requirements and maintain financial health.

The *Values* adopted by the Agency to guide its overall direction provide a strong base for the organization's approach to client service. These values are respect, transparency, trust, excellence, innovation, co-operation and accountability. They support and inform a series of principles specific to client-centred service.

PRINCIPLES

The following principles will guide the Agency's Client-Centred Service Strategy:

- leadership by example, from the Board and management within the organization, and from the Agency in its relations with its clients;
- mutual respect among individuals and organizations: honouring the contribution of all parties; demonstrating fairness, courtesy and professionalism; giving responsive and timely service;
- co-operation, teamwork and reciprocity;
- social responsibility;
- meeting of obligations;

- anticipation of client needs, which the Agency will try to meet when they fall within our mandate;
- transparent communications that are straightforward, accessible, timely, clear and accurate, in both official languages;
- consultation and feedback;
- continuous learning and improvement of both processes and outcomes.

THE AGENCY'S COMMITMENT

The Agency will develop, and annually review and update, a service strategy for each identified client and stakeholder group.

The strategy will consider each main point of contact between the Agency and members of the client or stakeholder group, setting and publishing service standards for each of these points of contact.

The Agency will define and measure satisfaction standards for its primary client group, housing co-ops, and, over time, for other stakeholders, as resources permit. In May 2005, the Agency undertook a survey of housing co-ops in its prospective service area in order to obtain baseline data on client satisfaction. The challenge of building an organization from the ground up and assuming responsibility in phases will affect client satisfaction and complicate measurement of client service in the short term. The Agency is, nonetheless, committed to setting clear targets for service and satisfaction standards from the start.

The Agency will integrate its client-service strategy into its management, operations and corporate culture.

- Management will incorporate the collection and review of data on client satisfaction into its continuing management of the Agency.
- The Board will treat client service as central in all its deliberations, including those relating to allocation of resources.
- The Board and management will set clear expectations of staff in their approach to client service. These expectations will be reflected in the Agency's recruitment practices, so that staff members are hired based not only on their technical skills, but also on their ability to deliver service in a manner that does credit to the Agency. Orientation and training programs, for both front-line and management staff, will continually address client-service issues to ensure that the Agency's commitment is faithfully maintained over time. Performance-management processes will have service excellence at their heart.

Transparency and the provision of information that meets clients' needs are fundamental parts of the Agency's client-service strategy. The Agency's *Confidentiality and Access to Information Policy* establishes a clear principle that the Agency should operate as openly as possible, subject only to legal and contractual constraints.

The Agency will interpret operating agreements consistently and with due regard for co-op entitlements and obligations. While offering co-ops feedback to support their effective governance and management, the Agency will respect the environment established by the legal operating agreement between CMHC and the individual co-op. The Agency will not seek to set requirements for co-ops beyond those contained in the operating agreements. It will seek to support voluntary improvements in co-ops' operational performance through the provision of appropriate information and resources and by encouraging participation in the training programs of CHF Canada and the regional co-operative housing federations.

The Agency will establish a formal **complaint and redress mechanism** to allow co-ops and others to bring forward concerns about the Agency's administration of the federal co-op housing programs and to ensure a fair resolution of the issues raised.

Monitoring and evaluation of the Agency's performance against established service and satisfaction standards will be ongoing, with review by the Board on at least an annual basis.

The Agency's policy on **bilingual service** and agreement with CMHC commit the Agency to serving client co-operatives, their members and the general public in the official language of their choice. This implies an active invitation to client groups to express their language preference and a commitment to respect that choice. The requirement applies equally to oral and written communications, whether electronic or printed.

STRATEGY FOR SERVICE TO CO-OPS

Housing co-ops are the Agency's primary client. The task of the Agency in administering the funding programs under which co-ops operate is twofold:

- to ensure that program requirements are met, and
- to do so in a manner that supports the co-op in meeting its own objectives of providing quality housing to its members.

It is in no one's interest for a co-op to fail. Effective collaboration with each co-op, and co-operation with the larger co-op sector to enable co-ops' success, are central to the Agency's approach.

In designing its program-management processes, the Agency will consult with housing co-operatives, CHF Canada and regional co-operative housing federations.

The Agency's monitoring and evaluation of co-op service and satisfaction standards will be informed by periodic surveys and service-specific feedback forms and through focus groups at CHF Canada's annual conference and other venues of importance. The frequency of the surveys will depend on the availability of resources, but will not be less than every three years. The Agency will further monitor service to housing co-operatives through

- monthly assessments of the Agency's performance in meeting its service standards;
- quarterly interviews with a small, random sample of co-ops and CMHC staff, in person or by phone;
- quarterly audits of a random sample of the Agency's client files by Team Leaders; representing at least 10 per cent of the portfolio in their region per year;
- visits to co-op clients by Agency Relationship Managers.

SERVICE STANDARDS

Initial service standards address both

1. direct program administration activity; and
2. transparency and the provision of information.

The standards that follow take into account the findings of

- a survey of federal co-ops on current CMHC service;
- telephone interviews with key informants from CMHC's staff;
- telephone interviews with key informants representing co-operative housing federations in different parts of Canada; and
- a literature review focusing chiefly on the Government of Canada's Citizen-Centred Service Strategy and service-standards information from the UK Housing Corporation.

Service Standards—Program Administration Activities

Service standards in this area relate primarily to timeliness—a key component of client satisfaction, and one that is measurable.

1. The Agency will respond to general communications within the following time limits:

- a. Voice mail left in general-delivery mail box: within four (4) business hours;
- b. Voice mail left in an individual staff member's mail box: within four (4) business hours of the individual's return to the office. (Staff will leave information about their return time or date on their voice mail if they are away and will refer the caller to someone for immediate assistance);
- c. E-mail: within one (1) business day of the individual's return to the office;
- d. Fax or letter: within two (2) business days.

If a full response is not possible within the above time limits, the Agency will give an interim response within the applicable time limit, advising when a full response will be available.

2. The Agency will respond to the following co-op requests within the time limits shown:

- a. Request for approval to spend replacement reserve funds: five (5) business days;
- b. Request for information (by mail, voice mail, e-mail, or personal contact): two (2) business days;
- c. Request for budget approval: four (4) weeks following receipt of a complete budget.

If a full response is not possible within the above time limits, the Agency will give an interim response within the applicable time limit, advising when a full response will be available.

3. The Agency will report back to co-ops within the time limits shown for the following procedures:

- a. Review of co-op financial statements: within four (4) weeks of receipt of the co-operative's valid Annual Information Return, audited financial statements and, where applicable, subsidy reconciliation form;
- b. Report on the co-op's compliance with its operating agreement: within five (5) weeks following receipt of a valid Annual Information Return;
- c. Production of the Agency's risk assessment of the co-operative: within five (5) weeks following receipt of a valid Annual Information Return;
- d. Report on the results of the physical inspection of the co-operative: within four (4) weeks following receipt of the inspection report at the Agency; within no more than three (3) days, the Agency will communicate any health or safety concerns.

If the above time limits cannot be met, the Agency will inform the co-op within the above time limits, providing the reasons why it cannot meet the deadline and advising when the review or report will be completed.

4. The Agency will ensure that each co-op has a primary contact within the Agency who will manage the relationship with the co-op. This person will normally be located in the Agency office dealing with the geographic area in which the co-op is situated. The Agency will notify co-ops within five working days of any decision to change the primary contact.

5. The Agency will consult with affected co-ops on proposed changes in Agency procedures prior to implementation. Consultation may be undertaken through a variety of methods including surveys, key-informant interviews and focus groups. The timeline and process for each consultation will be published on the Agency website at the start of each consultation.

Service Standards—Transparency and the provision of information

Information about the Agency, its policies and the programs it administers will be available to the general public and other stakeholders, as well as to co-ops, through the Agency's website. Housing co-ops are the group likely to take the greatest interest in this information.

The following standards will apply to the provision of general information:

1. Contact information for all Agency staff will be available on the Agency website in both English and French, updated within one (1) week of any change.
2. Within two (2) weeks of adoption of minutes of meetings of the Board of Directors and its committees, a summary of the proceedings will be published on the Agency's website, in both English and French.
3. New or updated policy and program information will be published on the Agency website in both English and French within two (2) weeks of approval by the Board or other appropriate authority. Where the effect of the changes will be significant for co-ops, the affected co-ops and co-operative housing sector organizations will be notified by e-mail (or fax or mail, if a co-op has no e-mail address) sent out within two business days of the posting.

For co-op clients, the provision of information extends beyond general program advice and Agency policies to the specific information needed by the individual co-op. Consistent with the principle of co-operation, teamwork and reciprocity, the Agency will use the information it receives from each co-op's Annual Information Return to give the co-op feedback on its performance in specific areas in an accessible, easily understood format. It will tell the co-op how its performance is trending and how it compares with its peers, as well as how it may use the information to enhance its performance (for example, in vacancy management or the collection of housing charges).

The following standards will apply to the provision of information specific to the needs of an individual co-op:

4. Timely information drawn from the co-op's Annual Information Return, including statistical comparisons with other co-ops, will be available to co-ops in the official language of their choice through a secure component of the Agency's website within four (4) weeks of receipt of the co-op's completed return and audited financial statements.
5. On payment of a reasonable fee to cover related costs, the Agency will respond to co-ops' information requests that require access to data drawn from non-electronic sources (e.g., paper files held in CMHC's archives) or that entail a customized electronic report. The Agency will provide a cost estimate and an indication of the time required to fulfill the request, within two weeks of receiving it.

SATISFACTION STANDARDS

Initially, the Agency's satisfaction standards for service to co-ops will be based on federal-government research, which has identified five drivers of service quality that together explain over 70 per cent of satisfaction or dissatisfaction for users of government services. The five factors are as follows:

- timeliness (the most important driver; studies show that delays cause 60 per cent of dissatisfaction);
- knowledge / competence;
- courtesy / comfort;
- fair treatment;
- outcome (did the client get what was needed?).

The Agency's target satisfaction standards are as follows:

1. 80 per cent of co-ops responding to a survey identify Agency service as satisfactory or better as to timeliness.
2. 80 per cent of co-ops responding to a survey identify Agency service as satisfactory or better as to staff knowledge and competence.
3. 90 per cent of co-ops responding to a survey identify Agency service as satisfactory or better as to staff courtesy.
4. 90 per cent of co-ops responding to a survey identify Agency service as satisfactory or better as to fair treatment.
5. 80 per cent of co-ops responding to a survey identify Agency service as satisfactory or better as to outcome (getting the results they wanted).
6. 90 per cent of co-ops responding to a survey confirm that they received service in the official language of their choice.

STRATEGY FOR SERVICE TO MEMBERS AND RESIDENTS OF HOUSING CO-OPS

Members and residents of housing co-ops are not clients of the Agency in a direct sense, but are likely points of contact in ways that distinguish them from the general public.

The Agency will establish a protocol for dealing with co-op members and residents who do not formally represent their co-op and are contacting the Agency as individuals. The protocol will seek to treat their concerns with respect, while preserving the integrity of the Agency's relationship with the co-op.

Service Standards

The same service standards that apply to the Agency's co-op clients as to timeliness of response will apply to inquiries from members and residents of housing co-ops.

Residents and members of housing co-operatives will receive responses to their requests in the official language of their choice.

The Agency will track all inquiries from individual members and residents of housing co-ops in a manner that allows for measurement of performance against standards.

Satisfaction Standards

The Agency will not, in the first instance, attempt to establish satisfaction standards for this group. Within one year of completion of the transfer to the Agency of responsibility for managing the programs, the Agency will review the frequency of contacts with individual members and residents to decide whether service-satisfaction standards are appropriate and feasible for this group.

STRATEGY FOR SERVICE TO THE GENERAL PUBLIC

The Agency's contacts with the general public are expected to include inquiries from students, calls from potential applicants for co-op housing and inquiries or complaints from neighbours of housing co-ops.

The Agency will establish protocols for staff to use in responding to public inquiries and will ensure that front-line staff have access to reference information that will allow them to direct the inquiry appropriately and knowledgeably. Where inquiries concern matters other than of a factual nature, the Agency will refer these to CMHC, as their Agreement requires. In addition, the Agency will also establish specific protocols for responding to inquiries from elected officials and the news media, which must be forwarded to CMHC within 12 hours.

Service Standards

The same service standards that apply to the Agency's co-op clients with respect to timeliness of response will apply to inquiries from members of the general public. Persons making inquiries will receive a response in the official language of their choice.

Satisfaction Standards

The Agency will not, in the first instance, attempt to establish satisfaction standards for this group.

STRATEGY FOR SERVICE TO ORGANIZATIONS PROVIDING SERVICES TO CO-OPS

As mentioned already, regional co-operative housing federations and property-management firms providing services to multiple client groups are all valued Agency partners. Establishing effective working relationships with these organizations and delivering a high quality of service to them will be vital to the Agency's success.

The Agency will consult with CHF Canada, regional federations, the Stabilization Fund and the larger co-op property-management firms to review relationships with these partner organizations and to discuss their expectations. The Agency will set standards of service based on these discussions.

CMHC has defined its expectations of the Agency's service-delivery standards in Schedule D of its agreement with the Agency.

Service Standards

To be determined following discussion with the organizations.

Satisfaction Standards

To be determined following discussion with the organizations.