CUSTOMER EXPERIENCE

CENTER OF EXCELLENCE

PHASE I FINDINGS:

Affordable Housing for Seniors

Transforming the Housing Experience

Develop HUD's capacity to design excellent customer experiences that have a measurable impact on the agency's customers.

How to Achieve CX Transformation

The CoE approach:
interview HUD internal and external customers

to learn how HUD works from citizens' and intermediaries' points of view

The output:
opportunities to improve outcomes

identified by a cross-program working group, based on qualitative data and insights from field research
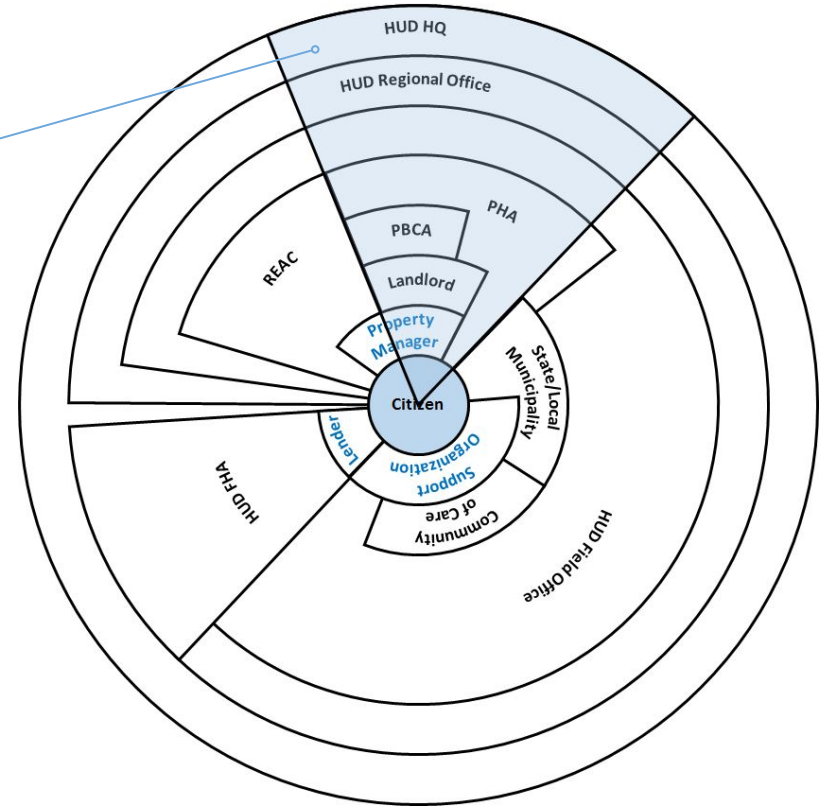
The engine:
the Office of Customer Experience

will drive the research, validation, prioritization and implementation to deliver measurably effective solutions, in perpetuity

Affordable Housing Journey for Seniors: Bellwether for System-wide Opportunities

Using human-centered design (HCD) research methods, the CoE team conducted over 50 interviews with a **cross section** of HUD customers - including very low income seniors and intermediaries.

The findings of this research represent common challenges all citizens and intermediaries face in navigating HUD programs.

Research Details

HUD HQ Briefings (21)
- Across FPM, PIH, Housing (FHA), Housing Counseling, CPD, FHEO, Public Affairs, Office of Administration, Lead Hazard Control and Healthy Homes, PD&R

HUD Field Office Staff (Baltimore, DC, LA, Philadelphia)
- Briefing/Panel Discussion (16)
- In-depth one-on-one interviews (7)

PHA Staff (LA, Pasadena, Glendale)
- In-depth one-on-one interviews (7)

Property Managers (LA, Pasadena, Baltimore)
- In-depth one-on-one interviews (6)
- Panel Discussions (2)

Public Housing Staff (LA)
- In-depth one-on-one interviews (2)

Seniors (LA, DC, Baltimore)
- In-depth one-on-one interviews (9)

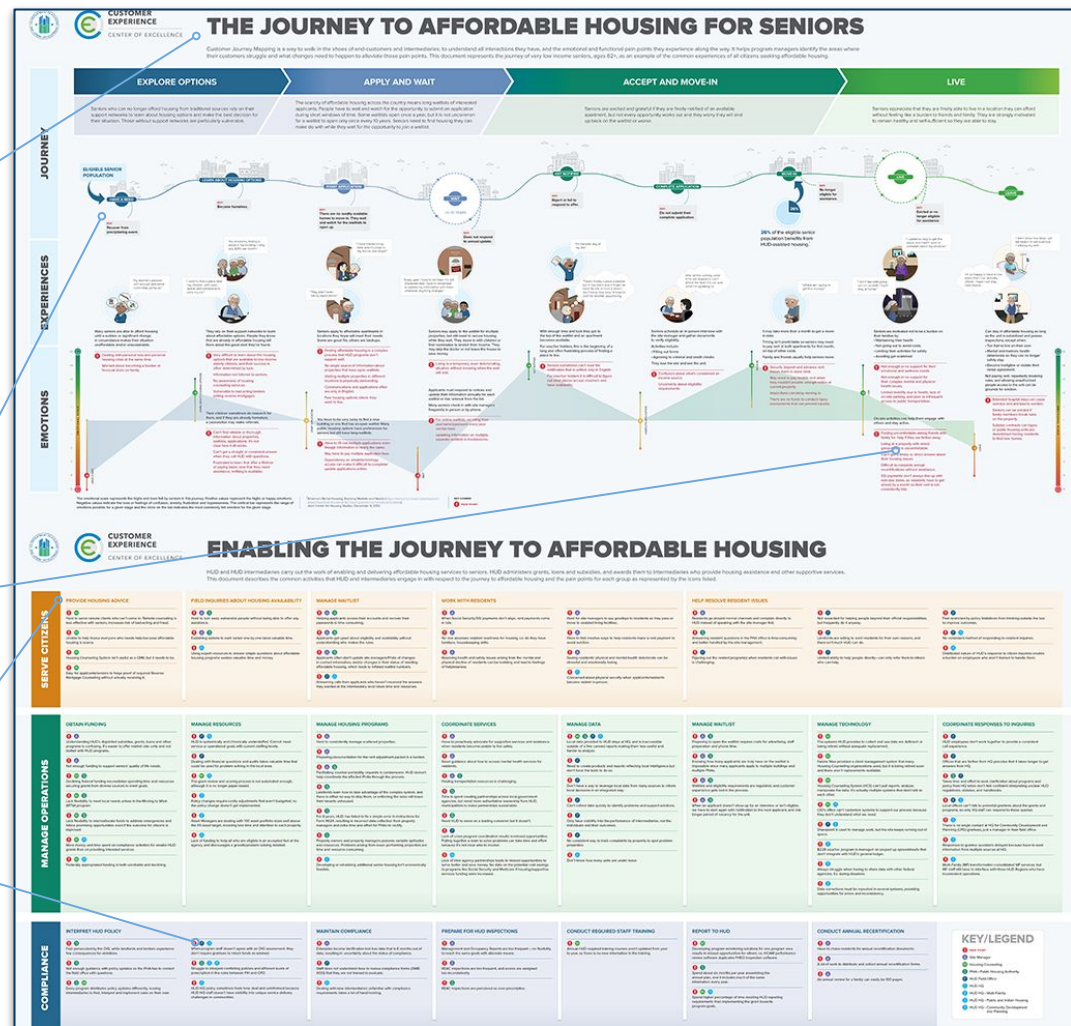**Housing Counseling Services (DC, LA)**
- In-depth one-on-one interviews (3)

Citizens and intermediaries interviewed for the Affordable Housing Journey for Seniors Research https://icfnext.app.box.com/s/r4t2x18qqkt0zukd8adye1kzr419beoa

Walking in the Shoes of HUD Customers

This **journey map** resulted from interviews with citizens and intermediaries in the Washington, D.C. metro, Baltimore, Philadelphia and Los Angeles.

The map depicts the **activities** and **pain points** of citizens seeking and residing in affordable housing.

The chart underneath presents the **primary functions** and **activities** of intermediaries and their related **pain points**.

THE JOURNEY TO AFFORDABLE HOUSING FOR SENIORS

EXPLORE OPTIONS · APPLY AND WAIT · ACCEPT AND MOVE-IN · LIVE

ENABLING THE JOURNEY TO AFFORDABLE HOUSING

Solutions Developed with a Cross-Agency Group

HUD-CX CoE Solution Design Workshop on February 28, 2019

- Established CX Working Group
- Shared learnings from the research with representatives from 7 program areas
- This working group brainstormed and prioritized opportunities to improve outcomes

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"Every area in HUD could benefit from learning about this approach."

"This was a great experience. I hope it won't be a black hole. I hope that the agency will continue to work on these ideas and let us know about it."

"We need to be better advocates for citizens."

"We all want to do a better job. Getting outside my bubble and getting ideas from others was very helpful."

"How do I replicate this in my program area?"

Lucy's husband passes away, and she is suddenly unable to afford her rent...

Current Experience

Lucy struggles to understand her affordable housing options.

"I don't know where to begin"

"I have to visit each property in person"

"The HUD website is confusing"

"I can't figure out which HUD number to call for help"

"I don't understand the requirements"

"I can't filter the search for my needs"

Imagine now…

Lucy is well prepared and confident that she can readily and independently understand her affordable housing options and requirements.

Proposed Opportunities

Make it easier to find properties for which they are eligible
Provide a filtered search based on amenities important to citizens, and push notifications about changes so applicants can make important decisions about housing with complete information.

Make it easier to find information about HUD resources
An omni-channel approach to delivering information about HUD services in clear, plain language that is easy for intermediaries and citizens to find based on their situation.

Increase awareness of HUD programs for citizens and intermediaries
Access information about affordable housing before it's needed via awareness campaigns and outreach to places citizens frequent.

Establish a centralized contact center with an enterprise-wide knowledge base and CRM
Deliver a common experience across all touchpoints and resolve issues in a timely manner with a single enterprise focused contact center for HUD.

Odette has narrowed her search to a few properties and is ready to apply...

Current Experience

Odette finds it harder than expected to complete the applications.

"I only found out second-hand that a waitlist was opening"

"I had to get up before sunrise to wait in a long line to apply"

"I had to apply in person at each property"

"It's frustrating to fill out a different application for each property with the same basic info"

"I needed someone to translate the form to my language so I could fill it out"

"I can't figure out which HUD number to call for help"

Imagine now…

Odette isn't worried about missing application windows, and with little effort or support, she can apply to multiple properties on her own.

Proposed Opportunities

Streamline the application process across properties:
Develop a standard application for common information used by all properties for HUD-supported housing to reduce the repetition of applicants filling out the same information at multiple properties. The information can be entered and updated electronically and shared instantly with all properties and HUD.

Provide all communications and forms in the preferred language of the applicant/resident:
Standard forms and notices provided in various common languages so eligible applicants can complete forms without needing help from site managers to translate them, and do not miss or misunderstand notifications. Help intermediaries that need translation services to provide this support.

Establish a centralized contact center with an enterprise-wide knowledge base and CRM:
Deliver a common experience across all touchpoints and resolve issues in a timely manner with a single enterprise focused contact center for HUD.

Steve spends another long Thursday evening entering data HUD requires of PHAs...

Current Experience

Steve struggles to meet compliance requirements *and* serve his community.

"This system is being retired next month with no replacement"

"I'm spending this whole grant on compliance, not service"

"We give HUD bare minimum data because I don't know what they do with it"

"I have to enter the same data into 3 systems"

"I need to analyze and visualize my local community but I don't have the tools"

"HUD changes reporting systems annually, I can't keep up"

Imagine now…

Steve can spend his Thursday night at a community meeting where he meets several developers interested in creating new affordable housing.

Proposed Opportunities

Enable data-informed decisions:
Identify and act on issues, alleviate reporting requirements, empower field offices and intermediaries to serve better by establishing a framework and guidance for data sharing between HUD offices and with intermediaries.

Provide dashboard-building tools to intermediaries:
Put the power to monitor performance into the hands of intermediaries by offering dashboarding and visualization as a HUD service to field offices and intermediaries.

Create and provide visualizations of struggling properties, citizens, and geographies
Perceive, understand, and forecast local issues in a consolidated view by furnishing field offices and intermediaries with heat maps and other GIS related visualizations that indicate customer perception and performance metrics.

Modernize legacy systems with a focus on serving intermediaries:
Prioritize agile development of modern HUD systems by impact on intermediary experience.

Lois the property manager is anxious about the MOR inspection next week...

Current Experience

Lois feels isolated in her job without support and tools to help her and her residents thrive.

"Where's the support? I need help to figure out this problem."

"I wonder who the inspector will be and how they will interpret the rules"

"I don't understand how the rules have changed since the last time"

"I wish it were easier to access support for my residents"

"I wish I had more time to spend on resident programming"

Imagine now…

Lois can sleep soundly tonight because she has the tools she needs to support her residents.

Proposed Opportunities

Unify HUD policy, regulatory, and guidance updates:
Ease the work intermediaries have to do to find, interpret, and implement new policy, regulations, and guidance by establishing a single, searchable digital location to find all policy updates and announcements.

Launch a collaboration network for sharing best practices:
Support intermediaries with additional technical assistance and best practices by providing a social network platform that enables intermediaries to connect and ask one another questions, share best practices, and see hot topics.

Standardize and simplify inspections:
Alleviate the uncertainty of HUD inspections by aligning requirements and timing across program areas.

Define minimum levels of compliance:
Relieve the burden of time consuming reporting requirements, increase flexibility in how funds are used while maintaining appropriate oversight of taxpayer dollars by simplifying compliance requirements across program areas, and establishing clear minimum standards for operational performance.

Convene and facilitate holistic services for citizens:
Save money and enable service providers to meet the holistic needs of residents more easily by establishing partnerships among federal agencies that make tailoring support services a clear and accessible activity.

Proposed Opportunities for CX Improvement

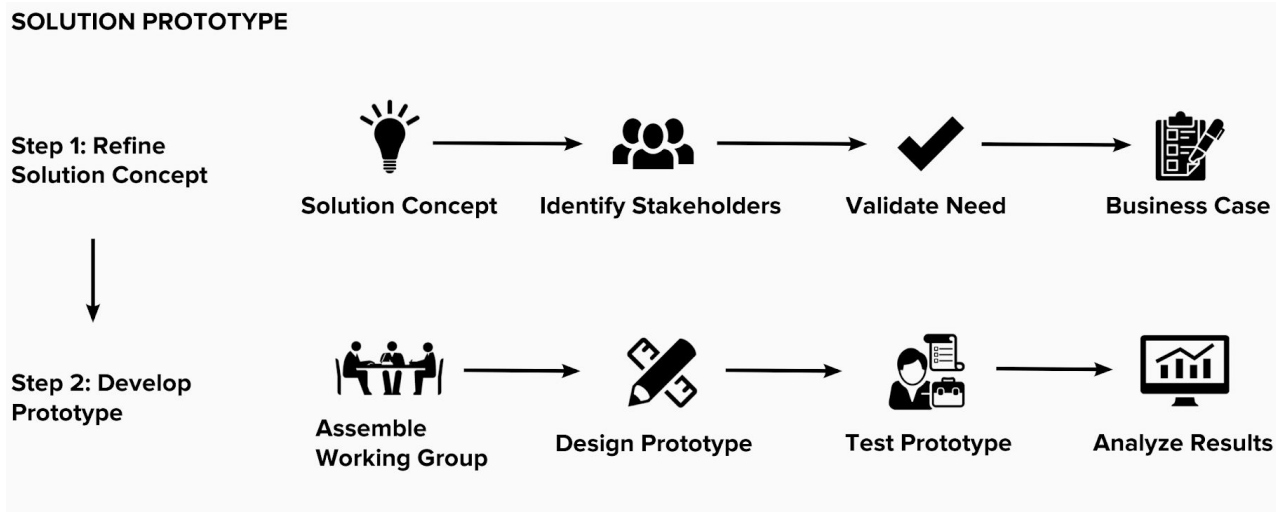|	Citizen Impact		
	Low	**Medium**	**High**
High HUD Effort		• Enable data-informed decisions • Modernize legacy systems with a focus on serving intermediaries	• Establish a centralized contact center with an enterprise-wide knowledge base and CRM • Create easy ways to search for properties based on specific criteria important to citizens • Create a common application for affordable housing • Build a portal for submitting applications electronically • Automate annual recertifications
Medium HUD Effort	• Establish a cross-program change management process	• Unify HUD policy, regulatory, and guidance updates • Provide dashboard-building tools to intermediaries • Standardize and simplify inspections • Define minimum levels of compliance	• Convene and facilitate holistic services for citizens • Establish a Voice of the Customer (VoC) practice • Increase awareness of HUD programs for citizens and intermediaries • Support flexibility in making rent payments • Assess applicant readiness for housing
Low HUD Effort		• Launch a collaboration network for sharing best practices • Create and provide visualizations of struggling properties, citizens, and geographies	• Develop omni-channel approach for delivering customer-focused content about HUD resources • Provide all communications and forms in the preferred language of the applicant/resident

Phase I Outcomes

Our research into the affordable housing journey yielded these outcomes:

1. **Illustrated the journey** of people experiencing HUD services.

2. **Identified opportunities and potential solutions** for the Office of Customer Experience to start exploring.

3. **Demonstrated a human-centered way of working** at HUD that improves customer experience and operational efficiency.

Bringing Opportunities to Life: Validation and Prototyping

We will validate prioritized solutions proposed from the research before preparing a business case to proceed with prototyping.

Once approved, prototypes will be designed and tested prior to moving forward with implementation.

SOLUTION PROTOTYPE

Step 1: Refine Solution Concept

Solution Concept → Identify Stakeholders → Validate Need → Business Case

Step 2: Develop Prototype

Assemble Working Group → Design Prototype → Test Prototype → Analyze Results

Bringing Opportunities to Life: Implementation and Measurement

Approved prototypes will be produced following the usual development lifecycle (i.e. requirements, development, testing, release).

Once released, we will measure the effectiveness of the solution by tracking metrics and collecting feedback, and will make adjustments for improvement.

SOLUTION IMPLEMENTATION

Step 3: Develop Solution

Refine Requirements → Develop Solution → User Testing → Release Solution

Step 4: Listen & Improve

Track CX Metrics → Collect Feedback → Refine & Enhance → Release Updates