

## **Addendum #1**

Informal Solicitation for  
Housing Service Center Customer Experience  
(Solicitation #5335)

**Date of Addendum #1: Thursday, March 12, 2020**

The Informal Solicitation for the above named project is amended as noted in this Addendum. This Addendum consists of 10 pages.

This Addendum revises the Submittal section of the solicitation (see Item 1 below) and lists questions received and SHA's responses (see Item 2 below).

**Item 1.** SHA is revising the following section of the solicitation:

**Submittals:** Submittal/Proposal due date is shown at the beginning of this solicitation. You are required to submit as indicated below. Use the submittal process that is checked.

- By e-mail to SHA's Contact shown at the beginning of this solicitation.
- One original and 4 copies of your submittal/proposal must be received by SHA by the date and time indicated at the beginning of this solicitation. Submittals/Proposals must be to the attention of SHA's Contact shown at the beginning of this solicitation and mailed to the following address:  
Seattle Housing Authority, 190 Queen Anne Avenue N, P.O. Box 19028, Seattle, WA 98109-1028 or hand delivered at SHA's main office located at 190 Queen Anne Avenue North (5th Floor, Reception), Seattle, Washington 98109. Submittals/Proposals received after the deadline date and time will not be accepted.

**Item 2.** The following is a list of questions received and SHA's responses to those questions.

**Question:** Do you require that we utilize both qual and quant methodologies, or can we provide a recommendation based on a best fit for your needs approach?

**Response:** In your response relating to Criterion 3: Research Methodology, please provide a detailed recommendation for the research methodology based on the needs described in the Project Description. A mixed-methods approach is expected, but not required. If only proposing qualitative or only proposing quantitative, please address this choice specifically in your response.

**Question:** It sounds like we will be interviewing a list of your clients/contacts. Our experts can help design the survey and also the survey invite/reminder letters. However, please confirm that SHA will be sending out the survey invitations and reminder letters to the contact list and that the vendor will not handle the contact list itself directly.

**Response:** If a survey is included as part of the final research methodology, SHA is able to send out the survey invitations and reminders to the contact list as needed.

**Question:** Please let us know if this will be conducted in English only, or if translations will be required.

**Response:** If a digital or paper survey is included, translation to our five most common languages (Somali, Vietnamese, Amharic, Tigrinya, Spanish) is ideal.

**Question:** Please let us know if there are any incentives that you intend to survey participants and if you will require the vendor to manage the incentive administration.

**Response:** We welcome recommendations for incentives. Proposed incentives can be described under Criterion 3 as well as Criterion 5. The vendor is required to manage any incentive administration.

**Question:** Can incentives be paid to research participants?

**Response:** We welcome recommendations for incentives. Proposed incentives can be described under Criterion 3 as well as Criterion 5. The vendor is required to manage any incentive administration.

**Question:** Under the “tasks” section on Page 1, the fourth bullet says: ....quality of service provided to clients visiting the housing service center”. Should this be strictly interpreted to mean that only those who physically enter the HSC are to be surveyed? (I would assume interaction occurs via phone or email. Are these people to be included in the population to be surveyed?)

**Response:** Our primary interest is in understanding the quality of service to participants physically visiting the HSC. However, budget permitting, additional information on other service methods (phone, email) would be welcomed.

**Question:** In what format is the baseline data (referenced on Page 2)? Is this qualitative or quantitative data?

**Response:** SHA can provide aggregated, demographic data regarding the entire population we serve. However, baseline data for the group of interest – those customers that visit the Housing Service Center – is less reliable. We do not have baseline qualitative data.

**Question:** What contact information does SHA retain for those who have visited the HSC (or contacted the HSC)? (Especially customers who may not continue to engage with the HSC for various reasons.)

**Response:** SHA does not maintain a log of customers that visit the HSC. However, one of our departments records notes in our database that can be queried for specific terms, such as “walk-in”. We recognize this as not very reliable data. We have email addresses for approximately 55% of customers and phone numbers for approximately 70% of customers.

**Question:** Does SHA have interpreters, or should our proposal include the use of our multi-lingual staff?

**Response:** SHA staff use an over-the-phone interpretation service with limited-English-speakers, and it is possible that the selected consultant can have access to that service during interviews with participants. We do not have interpreters on staff. Proposals should include a plan for engaging limited-English-speakers, through the use of translated documents, multi-lingual staff, and/or over-the-phone interpretation services.

**Question:** What additional details are you willing to provide, if any, beyond what is stated in bid documents concerning how you will identify the winning bid?

**Response:** The details are as described in the solicitation. Proposals will be evaluated and scored based on responses to each evaluation criterion noted in the solicitation. Additionally, as described under “Selection Process” in the bid document, SHA may also request additional information from proposers whose responses seem to have the greatest likelihood of success and/or be invited to interview or present their proposal.

**Question:** Has SHA gathered any information, formally with research or with informal questions, regarding customer experiences with the HSC? If so, can you tell us a little about when, what type of research, what you learned from that process? If not, what prompted SHA to begin this project now, and bring in an outside evaluation consultant?

**Response:** SHA does not have any current information on customer experience with the HSC, aside from anecdotal observations by staff and leadership. Excellence in customer service is both an organizational cornerstone and a key objective of our 2016-2020 Strategic Plan. SHA has tracked a few key performance indicators related to customer service. It has become recognized that these KPIs do not tell a complete story. The decision to bring in an outside consultant was based on: 1) Limited capacity by our staff to collect information about our customers and their experience, while also providing excellent customer service; 2) Limited capacity by in-house evaluation specialists to conduct the desired research in the desired time frame; and 3) A desire for expertise beyond what we have in-house.

**Question:** How many people at SHA will be on the team for this project that is, involved in refining and finalizing research questions and instruments in collaboration with us? What are their positions at SHA?

**Response:** A cross-departmental working group has been established and is working on several inter-related projects, including overseeing the customer experience research. This work group is comprised of 12 staff members and three external partners. Staff members include line-staff and management from the Housing Choice Vouchers and Housing Operations departments, including HSC staff. The work group has a designated Project Coordinator, who will be the primary contact person for the selected consultant. It is possible that a sub-group of the working group will be assembled for the development phase of the project.

**Question:** You mention understanding the journeys of different groups of customers, including applicants, participants, residents, and landlords. After the contract is awarded, can SHA provide lists of these different types of customers, along with contact

information, to facilitate reaching them for participation in the research? Alternately or additionally, could our staff collect data at the HSC?

**Response:** We are interested in data being collected at the HSC. We can additionally facilitate reaching customers via email and phone.

**Question:** You mention as a deliverable “a tool that can be utilized by SHA in the future to periodically determine impact of potential process and policy improvements.” Is SHA picturing this as the same instrument used to collect data for this project? Or is this a separate deliverable focused on customer satisfaction?

**Response:** We are open to either option and expect it to depend on the proposed methods detailed in the response relating to Criterion 3: Research Methodology.

**Question:** Regarding “Criterion 2: Firm's Experience with Target Audience,” can you tell us a little more about what you mean specifically in this context by a “high-needs population”?

**Response:** While data on the group of interest is limited, anecdotal observation indicates the many customers visiting the HSC may require different levels of service or accommodation based on physical needs, mental or behavioral health, limited-English-proficiency, limited technology proficiency, and/or visiting with children.

**Question:** The Scope of Work calls the consultant to “work with SHA staff to refine and finalize research questions and instruments proposed in the research methodology section of their response to this solicitation.” Have you already drafted questions and looked at instruments? Or, have you conducted a survey previously? If so, has this been the work of SHA staff or did you use a consultant? If a consultant was used, who was/is the consultant?

**Response:** A cross-departmental working group has been assembled and began meeting in early 2020. Research objectives, questions, and instruments were discussed and informed the project description and scope of work. The general themes were: who is coming to the Housing Service Center; why are they coming to the HSC; what was their experience like; how can we improve the customer experience?

Regarding instruments, the working group is interested in research that does not solely use surveys for data collection.

Research focused on the group of interest – customers that come into the HSC – has not been previously conducted. However, the agency is very interested in customer service and other projects have been undertaken in other areas. Recently, in 2019, Navicet conducted a sentiment survey of residents living in SHA properties.

**Question:** If surveys have been done in the past, were they conducted via phone, email or in-person?

**Response:** We have not recently surveyed this group of interest.

**Question:** If surveys have been done in-person, did SHA staff pose the questions and record answers or hand out a printed form?

**Response:** We have not recently surveyed this group of interest.

**Question:** Do you have results from any prior survey that have informed your work to date on the questions and/or instruments?

**Response:** No.

**Question:** Historically public housing residents have been challenged in providing email contacts. Given the availability of smart phones and easier access to computers, do you use email with individuals coming to housing service centers or is contact made by phone?

**Response:** Applicants, residents, and participants are able to make appointments via email or phone. They are also able to walk into the Housing Service Center without an appointment. We do not have data on the current distribution of appointments being made by phone versus email.

**Question:** What number of individuals do you anticipate being surveyed? Will the survey be conducted with all current residents, prior residents, or be restricted to those coming to service centers?

**Response:** We are most interested in those people coming to the Housing Service Center. Please include a proposal for target numbers based on the proposed methodology in the response relating to Criterion 3: Research Methodology.

**Question:** The survey focus is on residents and potential residents but have you anticipated including SHA housing staff, contractors and vendors?

**Response:** While the focus of this project is customer experience, we expect that the selected consultant will need to understand the policies and procedures governing the Housing Service Center. Proposals that include interviews with staff are welcome.

**Question:** How many people are served at the HSC?

**Response:** The HSC processes approximately 2,000 tickets per month.

**Question:** What languages do the research instruments need to be provided in? If languages other than English, will HSC assist with translation?

**Response:** After English, the five most common languages in the Housing Choice Voucher department are: Somali, Vietnamese, Amharic, Tigrinya, and Spanish. Cost of translation should be included in the response relating to Criterion 5: Proposed Price. SHA staff use an over-the-phone interpretation service with limited-English-speakers, and it is possible that the selected consultant can have access to that service during interviews with participants.

**Question:** Is online data collection desired both for the current data collection and future repetitions?

**Response:** No, not necessarily.

**Question:** Are interviews or focus groups desired? If so, is there a preference between the two?

**Response:** Yes. There is no preference between the two. Please explain why one or both or neither are proposed in your response relating to Criterion 3: Proposed Methodology.

**Question:** Will HSC staff be involved in recruitment of customer research participants?

**Response:** We are able to email or mail customers. If mail is proposed, please include this in the response relating to Criterion 5: Proposed Price. SHA staff will not do any direct (person-to-person) recruitment, with the exception of the possibility to recruit participants during the scheduling of appointments. The details of which would have to be worked on during the refinement of research questions and instruments phase of the project.

**Question:** Does SHA have restrictions against providing monetary incentives for research participation?

**Response:** No restrictions to monetary incentives. Monetary incentives for focus group participants are possible. Drawings for gift cards for survey respondents are possible.

**Question:** To what extent will staff have time and interest in participating in the design and implementation of the evaluation?

**Response:** Interest is high. A cross-departmental working group has been established and is working on several inter-related projects, including overseeing the customer experience research. This work group is comprised of 12 staff members and three external partners. Staff members include line-staff and management from the Housing Choice Vouchers and Housing Operations departments, including HSC staff. The work group has a designated Project Coordinator, who will be the primary contact person for the selected consultant. It is possible that a sub-group of the working group is assembled to more deeply participate in the design of the evaluation.

**Question:** Is the timeline firm? One to three more months would enable more collaboration with staff and clients.

**Response:** We are open to a different proposed timeline.

**Question:** Do you have any existing or historical customer experience data collection that this work will build on?

**Response:** Data collection in the Housing Service Center has been limited to counts. There have been attempts in the past – lasting for a couple weeks at most – to record the primary reason that a customer comes to the HSC. However, we do not believe this data to be entirely reliable and we know the data is incomplete.

**Question:** Are there any research methods that have been attempted before with little success that we might want to avoid?

**Response:** Anecdotal observation – and a general feeling among staff – suggest that customers who choose to come to the physical location to receive service – rather than communicate via phone or email – may have more difficulty with technology and/or may have limited-English-proficiency, among other reasons for choosing to come to the physical location. This gives us reason to believe that solely conducting research via electronic or phone survey would not be sufficient.

**Question:** What kind of support will SHA be able to provide in contacting the identified customer groups for research? For example, could we use a customer list to recruit from or to send a survey to?

**Response:** We are able to provide lists of current participants and residents. However, the data for who comes to the Housing Service Center is limited.

**Question:** Is the scope of the customer experience research limited to the experience at the (physical) Housing Service Center, or the customer experience of all interactions with the Seattle Housing Authority?

**Response:** The scope is limited to experience at the Housing Service Center at the central office of the Seattle Housing Authority.

**Question:** Will in-person research such as observation and intercept interviews at the Seattle Housing Authority Housing Service Center be possible?

**Response:** Yes, we welcome proposals that include observation and intercept interviews.

**Question:** Would observation or shadowing of frontline staff be possible to see how staff experience engaging with visitors?

**Response:** Yes, we welcome proposals that include observation or shadowing of frontline staff.

**Question:** Who are your assumed audiences or user groups for the Housing Service Center? Does it include landlords or others aside from tenants?

**Response:** Customers in the Housing Service Center include participants (currently leased households in the Housing Choice Voucher program), applicants (for both the HCV and Low-Income Public Housing programs), residents (households currently living in SHA owned buildings), and landlords (leasing or interested in leasing to HCV participants).

**Question:** What Services does the Housing Service Center provide?

**Response:** The Housing Service Center is a “front-desk” where customer issues are triaged, a lobby where customers wait to receive service, and a space with several meeting rooms to conduct business privately. The front-desk is staffed by Customer Service Specialists. However, a customer may ultimately receive service from Certification Specialists, Housing Counselors, Property Management, and others. Common transactions include paying rent, dropping off paperwork, requesting to meet with a Certification Specialist to complete a review, housing search assistance, and checking in for an orientation or admissions interview.

**Question:** Are there any routine and predictable reasons for individuals to visit the Housing Service Center that could be used to recruit participants who already plan to visit the service center?

**Response:** Paying rent, attending an orientation, and admissions interviews. It may also be possible to recruit participants that have scheduled appointments. However, the lead time may be short.

**Question:** Do people make appointments to come in (and might we recruit them for a research activity to gather feedback on the before, during and after) of their appointment?

**Response:** Some people do make appointments. Beginning in June 2020, we will test an appointments-only model for the Housing Choice Voucher program. While the majority of customers are HCV participants, the HSC also serves residents in other programs. It may be possible to recruit participants before, during, or after their appointments.

**Question:** Are you aware of any key differences between all SHA customers and those who come to the Housing Service Center in person?

**Response:** Anecdotal observation indicates that many customers visiting the HSC may require higher levels of service or accommodation due to physical needs, mental or behavioral health, limited-English-proficiency, limited technology proficiency, and/or visiting with children. We do not have data to validate those observations.

**Question:** One of the elements it is important to pay attention to when conducting ethical research with high-needs or at-risk populations is to ensure that honoraria or incentives for research participation are not coercive. We can make recommendations for appropriate incentives based on our experience with other populations, but if you have provided research incentives in the past, are their standard amounts or formats (gift card, check, cash, etc.) you tend to use?

**Response:** Recent research into customer service experience for residents living in SHA buildings gave \$20 to focus group participants and survey respondents were



entered into a lottery to win one of three \$100 gift cards. Recommendations for appropriate incentives are welcome.

**Question:** Are the customer journeys and personas supposed to represent all Seattle Housing Authority Tenants or only the people who come to the Housing Service Center?

**Response:** The group of interest for this research is limited to those people who come to the Housing Service Center.

**Question:** May we submit an appendix with resumes that does not count towards the page limit?

**Response:** Proposals should only include items as described in the solicitation.

**Question:** Will you please consider increasing the page limit by 2-3 pages to better accommodate inclusion of case studies and a clear methodology section?

**Response:** The page limit is firm. However, per the Selection Process described on page 4 of the informal solicitation document, SHA may request additional information from the proposer or proposers whose responses appear to have the greatest likelihood of success. In the response relating to Criterion 4: Portfolio, please describe the cases and the deliverables provided to the client(s). If publicly available, a link may be provided to case studies hosted on a website.

**Question:** Where can we find the required forms which need to be submitted with the submittal/proposal?

**Response:** The required forms are included at the end of the bid packet behind the cover sheet titled "FORMS TO BE COMPLETED AND RETURNED WITH YOUR SUBMITTAL." You can view the bid packet at:

<https://www.seattlehousing.org/solicitations/housing-service-center-customer-experience>

**Question:** Does SHA have an existing relationship with a firm you have sent the RFP to?

**Response:** Agencies/Firms who received notification of this solicitation must be kept confidential in order to maintain fairness. However, once the contract is in place solicitation documents will be made public record.

**Question:** Will we be able to hand-deliver a proposal to this address?

**Response:** Yes. Submittals can be hand delivered to: Seattle Housing Authority, 190 Queen Anne Avenue N, Seattle WA 98109, 5<sup>th</sup> Floor Reception Desk.

**Question:** Do you anticipate extending the bid due date?

**Response:** No, not at this time.

**Question:** Other than your own website, where was this bid posted?

**Response:** SHA uses different sources to advertise such as, consultant and construction rosters, Daily Journal of Commerce and participating plan centers.

**Question:** Was this bid posted to the nationwide free bid notification website at [www.mygovwatch.com](http://www.mygovwatch.com)?

**Response:** SHA did not send the Informal Solicitation to [www.mygovwatch.com](http://www.mygovwatch.com). However, a bid servicing center may have obtained copies of the documents and posted there.

**Question:** Have you had much interest in this RFP? May I ask, how many firms received this invitation?

**Response:** Agencies/Firms who received notification of this solicitation must be kept confidential in order to maintain fairness. However, once the contract is in place solicitation documents will be made public record.

**Question:** Do you have an approximate time frame for the Issuance of Notice of Award?

**Response:** The evaluation process can take 2-4 weeks. An intent to award letter will be issued once a selection has been made.

END OF INFORMAL SOLICITATION ADDENDUM #1