

**Request for Approval under the "Generic Clearance for Improving
Customer Experience: OMB Circular A-11, Section 280
Implementation"
(OMB Control Number: 2511-0001)**

TITLE OF INFORMATION COLLECTION: HUD Customer Experience (CX)
Survey

PURPOSE OF COLLECTION:

What are you hoping to learn / improve? How do you plan to use what you learn? Are there artifacts (user personas, journey maps, digital roadmaps, summary of customer insights to inform service improvements, performance dashboards) the data from this collection will feed?

The purpose of the HUD Customer Experience (CX) facilitated sessions are to understand customers' experience during the last two years, a period during which HUD's staff provided services largely through remote support.

These interactive facilitated sessions will allow for comparison between employee and customer perceptions of work effectiveness throughout the pandemic and an understanding of our customers' overall experience during this period.

Hypothesis: Customer requirements and experience have changed as a result of the pandemic and the current remote work environment, which has altered the way customers interact with and are served by HUD.

TYPE OF ACTIVITY: (Check one)

- Customer Research (Interview, Focus Groups)
- Customer Feedback Survey
- User Testing

ACTIVITY DETAILS

1. How will you collect the information? (Check all that apply)

- Web-based or other forms of Social Media
- Telephone
- In-person
- Mail
- Other, Explain:

Virtual teams meeting with an interactive response tool (MentiMeter)

2. Who will you collect the information from?

Explain who will be interviewed and why the group is appropriate for the Federal program / service to connect with. Please provide a description of how you plan to identify your potential

group of respondents and if only a sample will be solicited for feedback, how you will select them (e.g., anyone who provided an email address to a call center rep, a representative sample of Veterans who received outpatient services in May 2019, do you have a list of customers to reach out to (e.g., a CRM database that has the contact information, intercept interviews at a particular field office?)

The end customers for the survey will be the employees of benefits providers of HUD. This group will represent different organizations that distribute funds to public customers on behalf of HUD. HUD directly serves these benefits providers to support them in distributing resources to the public customer. HUD has consolidated lists of benefits providers and their employees that interact with HUD. Outreach will be conducted to the benefits provider organizations, as well as individual employees from each organization that directly interact with HUD. Similar outreach methods to this key customer group have been utilized successfully with HUD's recent outreach communications around the child's tax credit.

To participate in these sessions, an email will be sent for all participants to sign up for a facilitated session through Microsoft Forms. Targeted customers include individuals who work for:

- Government Organizations,
- HUD Partners including:
 - Public Housing Authorities,
 - Community Development Housing Authority,
 - Owner Agents of HUD Assistance Properties,
 - FHA Lenders

3. How will you ask a respondent to provide this information?
(e.g., after an application is submitted online, the final screen will present the opportunity to provide feedback by presenting a link to a feedback form / an actual feedback form)

Respondents will be invited to a series of 10 different live facilitated sessions via Microsoft Teams that will each last 1.5 hours. Respondents will be encouraged to only attend one session. Facilitators will voice over questions and attendees will be invited to join an interactive response tool (MentiMeter) to provide their inputs for each question. As responses are submitted, the response tool will live aggregate and visualize responses for all participants to view. Participants will also have the ability to place input into the Teams chat and that information will be downloaded and combined with the interactive tool data.

4. What will the activity look like?
Describe the information collection activity - e.g. what happens when a person agrees to participate? Will facilitators or interviewers be used? What's the format of the interview/focus group? If a survey, describe the overall survey layout/length/other details? If User Testing, what actions will

you observe / how will you have respondents interact with a product you need feedback on?

Facilitators will open up sessions with a short video from HUD's executive leadership team to provide an explanation of the overall customer experience effort and the purpose of the session. Facilitators will then invite participants to join the interactive feedback tool (MentiMeter) and will demo how to provide responses within the tool. Once participants are properly logged into the tool, facilitators will provide a practice question to test responses.

Following, facilitators will guide respondents through all questions (as described below) and will provide light commentary to keep responses moving. As responses come in, respondents will have the ability to live view aggregated responses through visualizations provided in the interactive tool and projected on teams.

5. Please provide your question list.

Paste here the questions or prompts presented to participants in your activity. If you have an interview / facilitator guide, that can be attached to the submission and referenced here.

Please make sure that all instruments, instructions, and scripts are submitted with the request.

Introduction Message (pre-recorded video from HUD leadership): Welcome to the HUD customer experience facilitated session. Your work as a member of our benefits provider ecosystem is critical in helping HUD meet our mission to create strong, sustainable, inclusive communities and quality affordable homes for all. On behalf of the HUD leadership team, we thank you for your dedication to our shared mission.

As a direct customer of HUD, we want to better understand your experience. It is our mission to support each of you in having the right access to information and personnel that you need to achieve your objectives. The pandemic has changed many things about where, when, and how we serve our public customers and we would like to hear directly from you how your experience has changed. Please take 10-15minutes to complete the survey below and reach out directly to our team if you have any questions or concerns.

Thank you again for taking the time and we look forward to receiving your feedback.

Facilitators will cover logistics of the session:

- How to utilize the chat
- Accessibility considerations (close captions, where to direct questions)
- How to log into the interactive tool

Facilitated Questions:

1. What type of benefit(s) or service(s) do you provide to public customers?– *Select multiple if applicable*
 - **Access to Affordable Rental Homes:** Programs to grow, preserve, and fund affordable rental home access, and provide supportive services to residents

- **Homeownership Opportunity & Housing Market Stability:** Programs and lending/securities products that facilitate equal opportunity homeownership and strengthen the market
 - **Housing Quality & Improved Living Conditions:** Programs to assess and mitigate hazards or deficiencies in housing, and tools to facilitate asset management for HUD and improved living conditions for citizens
 - **Economic Growth & Community Resilience:** Grants and programs to stimulate economic development and grow strong, resilient communities or revitalize those in disaster areas
 - **Fair Housing and Equal Opportunity Enforcement:** Support to agencies and organizations ensuring fair, safe, equitable housing practices and channels for citizen reporting of potential housing discrimination
2. What is the number of customers that your organization provides benefits or services to on an annual basis?
 - *0-50 customers*
 - *51-100 customers*
 - *101-500 customers*
 - *500-1000 customers*
 - *1,001+ customers*
 3. How would you describe HUD in one or two words?
 - *Open ended response*
 4. What is the size of your organization by number of employees?
 - *0-10 employees*
 - *11-50 employees*
 - *51-100 employees*
 - *100+ employees*
 5. What is the length of your personal engagement with HUD?
 - *0-1years*
 - *1-2years*
 - *3-5years*
 - *6years+*
 6. What has been the most challenging thing about the remote work environment as it relates to how HUD serves you?
 - *Open ended response*
 7. If you received services or engagement from HUD for over 2 years, how would you rate your experience PRIOR To the Pandemic?
 - *5 = excellent*
 - *4 = adequate*
 - *3 = sufficient*
 - *2 = inadequate*
 - *1 = unacceptable*
 - *Not applicable)*
 8. If you have received services or engagement from HUD during the Pandemic, how would you rate your experience?
 - *5 = excellent*
 - *4 = adequate*

- 3 = *sufficient*
 - 2 = *inadequate*
 - 1 = *unacceptable*
 - *Not applicable*
9. Please provide examples of how you utilize in person interactions with HUD personnel to meet objectives.
- *Open ended response*
10. Prior to the pandemic, how often did you meet in person with HUD personnel?
- Very frequently
 - Frequently
 - Neutral
 - Infrequently
 - Very infrequently
 - Never
11. How important is it to you to have in person access to HUD personnel?
- Extremely important
 - Important
 - Neutral
 - Unimportant
 - Extremely unimportant
12. How important is flexibility in where you engage with HUD?
- Extremely important
 - Important
 - Neutral
 - Unimportant
 - Extremely unimportant
13. How important is flexibility in when you engage with HUD?
- Extremely important
 - Important
 - Neutral
 - Unimportant
 - Extremely unimportant
14. How would you rate your need to meet in person with HUD personnel to meet your objectives?
- Extremely important
 - Important
 - Neutral
 - Unimportant
 - Extremely unimportant
15. How would you rate your preference for meeting in person with HUD personnel to meet your objectives?
- Extremely important
 - Important
 - Neutral

- Unimportant
 - Extremely unimportant
16. Rate the importance of engaging in person with HUD personnel to meet your objectives?
(all answers on a sliding scale 1 extremely unimportant to 5 extremely important)
- Monitoring
 - Property inspection
 - Technical Assistance
 - Training
 - Conferences/Networking
 - Milestone Achievements (groundbreaking, ribbon cuttings)
 - Other
17. How would you rate your ability to reach HUD personnel in a timely manner during the pandemic?
- 5 = *excellent*
 - 4 = *adequate*
 - 3 = *sufficient*
 - 2 = *inadequate*
 - 1 = *unacceptable*
 - *Not applicable*
18. In your general interactions HUD personnel, do you get the information you need to address the reason for your interactions?
- Yes
 - No
 - Not applicable
19. How do you primarily communicate with HUD?
- *Emails*
 - *Teams meetings*
 - *Zoom meetings*
 - *Phone calls*
 - *Text messages*
 - *Mail*
 - *Website*
 - *In person interaction*
 - *Other*
20. What has changed during the pandemic related to the technology HUD utilizes to serve and communicate with you?
- *open ended response*
21. Does the current technology utilized by HUD to contact you meet your needs?
- *Yes*
 - *No*
 - *Other*
22. How could enhanced technology support your experience as you interact with HUD?
- *Open ended response*
23. What have we not asked and what information may be helpful to us as we move HUD forward?

- *Open ended response*
24. What stakeholder group do you represent?
- *Open ended response*
25. What is your zip code?
- *Open ended responses*

6. When will the activity happen?
Describe the time frame or number of events that will occur (e.g., We will conduct focus groups on May 13,14,15, We plan to conduct customer intercept interviews over the course of the Summer at the field offices identified in response to #2 based on scheduling logistics concluding by Sept. 10th, or "This survey will remain on our website in alignment with the timing of the overall clearance.")

There will be 10 different live facilitated sessions offered (8 in English, 2 in Spanish) from October 25-November 12 with a capacity of 300 people per session.

7. Is an incentive (e.g., money or reimbursement of expenses, token of appreciation) provided to participants?
 Yes No
 If Yes, describe:

BURDEN HOURS

Category of Respondent	No. of Respondents	Participation Time	Burden Hours
Employees of Benefits Providers / Partners of HUD	~3,000	1.5 hours	4,500
Totals	3,000	1.5 hours	4,500

CERTIFICATION:

- I certify the following to be true:
1. The collections are voluntary;
 2. The collections are low-burden for respondents (based on considerations of total burden hours or burden-hours per respondent) and are low-cost for both the respondents and the Federal Government;
 3. The collections are non-controversial and do not raise issues of concern to other Federal agencies;
 4. Any collection is targeted to the solicitation of opinions from respondents who have experience with the program or may have experience with the program in the near future;

5. Personally identifiable information (PII) is collected only to the extent necessary and is not retained;
6. Information gathered is intended to be used for general service improvement and program management purposes
7. Upon agreement between OMB and the agency aggregated data may be released as part of A-11, Section 280 requirements only on performance.gov. Summaries of customer research and user testing activities may be included in public-facing customer journey maps.
8. Additional release of data will be coordinated with OMB.

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**All instruments used to collect information must include:
OMB Control No. 2511-0001
Expiration Date: 09/30/2024**

HELP SHEET
(OMB Control Number: XXXX-XXXX)

TITLE OF INFORMATION COLLECTION: Provide the name of the collection that is the subject of the request. (e.g. Comment card for soliciting feedback on xxxx)

PURPOSE: Provide a brief description of the purpose of this collection and how it will be used. If this is part of a larger study or effort, please include this in your explanation.

TYPE OF COLLECTION: Check one box. If you are requesting approval of other instruments under the generic, you must complete a form for each instrument.

CERTIFICATION: Please read the certification carefully. If you incorrectly certify, the collection will be returned as improperly submitted or it will be disapproved.

Personally Identifiable Information: Agencies should only collect PII to the extent necessary, and they should only retain PII for the period of time that is necessary to achieve a specific objective.

BURDEN HOURS:

Category of Respondents: Identify who you expect the respondents to be in terms of the following categories: (1) Individuals or Households; (2) Private Sector; (3) State, local, or tribal governments; or (4) Federal Government. Only one type of respondent can be selected per row.

No. of Respondents: Provide an estimate of the Number of respondents.

Participation Time: Provide an estimate of the amount of time required for a respondent to participate (e.g. fill out a survey or participate in a focus group)

Burden: Provide the Annual burden hours: Multiply the Number of responses and the participation time and divide by 60.