NATIONAL RESOURCE CENTER FOR

DILIGENT RECRUITMENT

at AdoptUSKids

Using Customer Service Concepts to

ENHANCE RECRUITMENT AND RETENTION PRACTICES

January 2013

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INTRODUCTION

The National Resource Center for Diligent Recruitment at AdoptUSKids (formerly the National Resource Center for Recruitment and Retention of Foster and Adoptive Parents at AdoptUSKids) developed ***Using Customer Service Concepts to Enhance Recruitment and Retention Practices*** through a cooperative agreement (grant #90CQ002) with the U.S. Department of Health and Human Services, Administration for Children and Families, Children's Bureau. Our two goals for this publication are to:

- Provide child welfare agency leaders with an overview of customer service concepts that can help with recruitment and retention of foster, adoptive, and kinship families.[1]
- Guide agency leaders in assessing, developing, and implementing relevant policies and practices to support good customer service.

We dedicate this publication to the hundreds of committed and excellent child welfare practitioners and foster, adoptive, and kinship families we have met and worked with since AdoptUSKids began in 2002. These outstanding, and often unrecognized, customer service heroes inspired this publication and continue to inspire all of our work. We share a conviction with them that retention of foster, adoptive, and kinship caring families is the key to an agency's success in recruitment; and, ultimately, to achieving safety, permanence, and well-being outcomes for the children and youth in foster care.

Through our work with States, Tribes, and Territories, we have been on a journey to help public child welfare systems' improve retention, engagement, and satisfaction levels of their foster, adoptive, and kinship families. Our work has provided us with the opportunity—and privilege—to talk with and have our hearts touched by hundreds of foster, adoptive, kinship caring families, and child welfare leaders, managers, and practitioners. We continue to be reminded that child welfare is about caring, building strengths-based relationships, encouraging teamwork, and treating one another with kindness and respect.

Our journey has led us to consider how to apply developments in the practice known in other fields as "customer service" to engage and support foster, adoptive, and kinship families more effectively. We have observed the ways in which creating a positive experience for the customer is pursued vigorously in settings outside of child welfare—such as restaurants, hotels, and other businesses—and worked to understand how to adapt these ideas to the work of child welfare agencies.

Although foster, adoptive, and kinship families have not traditionally been viewed as "customers" in the field of child welfare, the importance of the working relationship built between a family and an agency is one that involves many similar dynamics as those between a business and its customers. A family's perception of how they are treated during their interactions with an agency and its staff

1 This guide focuses on the provision of good customer service to foster, adoptive and kinship families. While the same principles for providing good customer service apply equally to all families that child welfare agencies serve, including birth families, because of our focus here on foster, adoptive, and kinship families, whenever we use "families" as shorthand in this guide, we are referring specifically to foster, adoptive, and kinship families.

members can have a major impact on their decision to become foster, adoptive, or kinship parents, and subsequently, on their decision to continue in that role. A family's perception of their customer service experience with an agency can also play a crucial role in whether that family spreads positive or negative word-of-mouth messages to other potential families about the agency and foster care and adoption in general. Families continue forming and adjusting their perceptions of how well the agency supports them in meeting children's needs after children are placed with them. By providing post-placement support and services to help meet children's needs, the agency can reinforce the trust it built with families from their first point of contact.

This publication, ***Using Customer Service Concepts to Enhance Recruitment and Retention Practices,*** has evolved because of this journey. It integrates and adapts lessons learned about good customer service from world-class leaders in business, child welfare, and the ongoing work of AdoptUSKids to the challenging and often stressful responsibilities of the child welfare system.

By their very nature, cooperative agreements are characterized by close and ongoing interaction between the participants. We cannot go, however, without acknowledging the helpful guidance and hands-on involvement that the Children's Bureau has provided us through every stage in the development of this material and the refinement of our framework for applying customer service principles to child welfare work.

Child Welfare Agencies Working as Part of Child Welfare Systems

This guide is focused primarily on addressing ways to apply customer service principles and best practices within child welfare agencies, but we also recognize that child welfare agencies work with many other important partners within the child welfare system as a whole. Throughout this guide, in recognition of the importance of empowering child welfare agencies to begin the work on creating customer service improvements internally, we focus on suggested strategies and approaches that child welfare agencies can implement in their own work, but many of the principles in this guide also apply to other components and partners within child welfare systems, such as courts, contracted private agencies, Citizen Review Boards, and others. If full child welfare systems use this guide to implement customer service improvements, some elements and ideas may need to be modified to align with a child welfare systems-wide perspective rather than with the child welfare agency perspective presented in this publication.

We wish to thank our staff, consultants, and experts who contributed their ideas to the development of this material. We also wish to acknowledge the contributions of other members of the Children's Bureau's Training and Technical Assistance Network along with state, local, tribal, and publicly administered and supported child welfare agencies, family and juvenile courts, and Adoption Exchange Association members. These agencies continue to provide valuable insights into the successful practices they use to engage and retain foster, adoptive, and kinship families. We are especially grateful to jurisdictions leading the way in implementing customer service initiatives within their child welfare work, demonstrating that this exciting approach to improving outcomes can really work. Through the experiences shared with us by leaders, staff, and families, we continue to learn about their extraordinary commitment and outstanding service to foster, adoptive, and kinship families.

DEFINING CUSTOMER SERVICE

The customer service an agency provides is different from the services it delivers. An agency's **services** might include foster care and adoption, family reunification, and youth development, whereas **customer service** refers to the manner in which an agency provides its services and the way an agency treats people. Providing good customer service means underscoring respect, empathy, and caring as we relate to each other and the people we serve.

A few simple definitions of customer service are:

- The way we treat people with whom we do business.
- The attitude from which service is provided.
- Anything we do for the customer that enhances the customer's experience.
- "Exceeding your guest's expectations and paying attention to detail."[2]

As is the case in the private sector, individuals and communities develop a perception of public child welfare agencies. When any agency moves beyond simply defining and emphasizing the importance of customer service to insuring that its customers experience consistency in the quality of services received, the agency earns trust and loyalty. For example, when a person receives attentive service from a business and sees that the business anticipates and responds to their needs over time and across multiple interactions, they will be more likely to continue as a customer and to promote the business to their family and friends. Conversely, if the person receives poor, inattentive, or unresponsive service from a business, it's unlikely they will return as a customer and will discourage their family and friends from becoming customers.

Although a child welfare agency is not a business, the idea of consistently providing high levels of services to all customers can become its "customer service" culture. What matters most in terms of recruitment and retention is how foster, adoptive, and kinship families perceive and experience the services provided. In fact, the agency will be judged based on families' perceptions. Taken from this perspective, every interaction with an agency shapes the feelings customers have; thus, recruiting and retaining families requires that families perceive they have been well taken care of at every step of service delivery. Through our training and technical assistance with States, Tribes, and Territories on recruitment, retention, and customer service, we echo this concept repeatedly. This quote from a foster parent participating in a focus group captures a common sentiment: "If workers treated us with respect and kindness we would do anything for them."

Reflecting on the needs of the internal and external customers identified previously, customers of child welfare agencies should feel respected, valued, heard, cared for, and supported to the greatest extent possible. In child welfare, due to our mandate to protect children, there will be times when the customer may not be in agreement with an agency decision. However, in those difficult situations, good customer service requires recognizing the value of the customer's perspective and incorporating respectful approaches in every interaction, even when people disagree or have conflicts.

2 360º **Quality Assurance for Hotels and Guest Houses, Hospitality Manuals**, 2010, pg. 4, *http://www.scribd.com/doc/30808570/360-Degree-Quality-Assurance-for-Hotels* (accessed 7.15.2012).

A key idea in good customer service practice is that the customer's voice is very important. It is crucial that foster, adoptive, and kinship families feel they have a voice in what happens to the children in their homes. They want to be treated as trustworthy persons and valued members of the team. Likewise, it is also crucial all staff members, the internal customers, feel their voice is heard and that they are an integral part in helping an agency achieve its overall goals.

Defining Customer Service for Child Welfare

One possible definition for customer service that incorporates the ideas described above and could be applied to both internal and external customers in child welfare is:

> ***customer service:*** *customers' perceptions of the way they are treated, the responsiveness of the services provided, and the extent to which they are engaged in teamwork to meet the needs of children and youth*

Your agency might want to develop a different definition of customer service for your work, but this definition serves as a working definition for the purposes of this publication.

The "Tools" section on page 28 of this publication includes an assessment exercise for your agency to use in exploring how internal and external customers would rate your agency on the key elements and principles of your definition of customer service in child welfare. This assessment tool provides a way for agency leaders to discuss how to make the customer service definition operational in their agency, and identify ways that key concepts in the definition affect agency customers in real work interactions.

WHY CUSTOMER SERVICE IN CHILD WELFARE?

Many promising ideas and reforms have happened over the past decade in child welfare. These ideas and reforms were fueled in part by the implementation of the Adoption and Safe Families Act (ASFA)[3], the Child and Family Services Review (CFSR) process, Systems of Care initiatives, and the Fostering Connections to Success and Increasing Adoptions Act.[4] This has led to a significant paradigm shift of the role a child welfare agency plays, moving away from the mindset that it is the child welfare agency's job alone to protect and keep children safe. The current belief is that a child welfare agency's role is to empower and build the capacity of parents and communities to protect and nurture their children. This new paradigm relies on engaging and partnering with families and communities, and a strong commitment to teamwork within the agency.

In the context of important child welfare reforms, focusing on customer service doesn't need to be viewed as another new, stand-alone initiative. In fact, providing good customer service is a continual process of improvement that is integral to—and adds value to—the services and programs that an agency already provides and outcomes they are trying to achieve. This is because the values and practices that form the foundation for good customer service[5] also support and reinforce key child welfare principles such as family engagement and family-centered practice. Good customer service refers to the manner in which these services are provided and lays the foundation for building trust and teamwork with families. Having an approach to good customer service that is integrated into the way an agency delivers services can help ensure that an agency emphasizes respect, empathy, caring, and professionalism into the work your agency already does.

Change is challenging in all organizational cultures and agencies, but particularly difficult in child welfare because it is an extraordinarily complex and stressful field of endeavor. Change leaders need to focus on both the technical aspects and the adaptive, people side of change in order to be effective in creating sustainable systemic change. Lasting change related to delivering good customer service cannot occur without building an agency's culture to support good customer service for both internal and external customers.

Child welfare agencies all over the country are already providing good customer service in some situations, but it is not always consistent, supported, or integrated into agency culture and policy. The competencies needed for good customer service are the same professional competencies needed to engage, support, and retain foster, adoptive, and kinship families. High performing customer service organizations, including child welfare agencies, ensure everyone in the organization knows good customer service is expected, supported, and rewarded. These organizations and agencies create a sustainable climate and culture to encourage good customer service and prioritize providing it to both internal and external customers.

3 Public Law 105-89, enacted in 1997

4 Public Law 110-351, enacted in 2008

5 We want to explain our use of the phrase, "good customer service" to describe this body of work. "Good" may seem like a plain word as a descriptor for customer service, but we think it fits perfectly. According to the Merriam-Webster dictionary definition, "good" means bountiful, certain to last, competent, skillful, praiseworthy, and deserving of respect. Based on this definition, we believe that "good customer service" is a worthwhile endeavor and is something that every child welfare agency can achieve.

Does Customer Service Really Apply to Child Welfare?

The term "customer" applied within child welfare may seem simplistic and a little off-putting to some child welfare professionals and families. In order for this application of a customer service framework to work in the child welfare field, we must recognize and honor the fact that child welfare work is different and much more complex than the traditional business of selling products or services. Foster, adoptive, and kinship families—and certainly child welfare staff—don't usually perceive themselves as customers. Families' roles are unique to child welfare and evolve over time, ideally, to becoming team members and partners. Knowing this, it is essential to respect and treat families as customers first, as a key step to helping develop trusting professional relationships and partnerships between families and an agency. In short, good customer service should be seen as the foundation to building relationships that result in safety, timely permanency, and well-being for the children served.

Guiding Principles for Good Customer Service in Child Welfare

Each participant in the child welfare system, from the person who sweeps the floor, to the agency director, to the judge, to the foster, adoptive, or kinship family, must feel like a valued member of the team and take the act of providing good customer service to heart. They must all see themselves as empowered to achieve the collective goals and mission of ensuring safety, permanency, and well-being for children. Good customer service is everybody's business.

In recognition of the serious nature of child welfare work and the factors that distinguish child welfare from other services, we have developed operating principles and values to underpin our work on customer service, including our capacity building technical assistance with jurisdictions. These operating principles provide the conceptual base for this work and include the following:

- There are three main dimensions to consider in providing good customer service—processes, relationships, and organizational culture (which make up our PRO Framework to customer service discussed on page 15). Even in the smallest effort to implement customer service improvements, you must consider all three dimensions to bring about sustainable change.
- Good customer service is a continual process of improvement, touching all processes, relationships, and people in the agency and those served by it. It is more than just a one-time, feel-good initiative, or the responsibility of a single department or individual. Sustainable, high-quality customer service requires agency-wide cultural change in order to expand and solidify good customer service principles. This will help your agency sustain good customer service over time and through changes in individual staff.
- Leaders need to communicate and consistently reinforce customer service standards, priorities, and expectations throughout the child welfare agency and community.
- Power and empowerment often play a much bigger role in child welfare than in other services because of the dual mandate of protecting children and serving families. Child welfare professionals must understand and sensitively manage power and authority in all interactions with foster, adoptive, and kinship families.
- Good customer service requires that leaders empower and support their staff to carry out competent service delivery. Good customer service must lie in the hands and hearts of all staff members who interact with internal and external customers, and those staff members must be supported by an agency-wide commitment to providing good customer service.

WHO ARE THE CUSTOMERS IN CHILD WELFARE?

When asking child welfare staff members, *"Who is the customer in child welfare?"* they typically answer "the child." Even though the primary focus for child welfare agencies is achieving safety, permanency, and well-being for children, we suggest that child welfare agencies have multiple customers. These customers include children; youth; birth parents; relatives; community partners; staff members of other relevant agencies; foster, adoptive, and kinship families; and the staff members who work with all these individuals. The focus of this publication is on improving customer service for foster, adoptive, and kinship families, but many of the principles and approaches described in the publication are also applicable to work with birth families and other areas of focus for child welfare systems.

As we apply concepts from customer service to child welfare work, the term "customer" takes on a slightly different meaning than it does in interactions between a business and a customer who purchases goods or services from that business. In the context of child welfare work, there are two categories of customers:

- **External customers** are the people you do business with outside of your agency. They are the people you serve, collaborate with, and with whom you interact and share your expertise. They include children, youth, birth parents, and extended family members. External customers also include courts and legal professionals, Tribes, contract agencies, cross-system collaborators, advocates, and other community partners.[6]
- **Internal customers** are the people you work with throughout your agency. They are colleagues, staff members in other agency divisions, and other peers who provide services to you or to whom you provide services (e.g., the financial department staff, licensing workers, data staff, etc.). Put more simply, every staff member within the agency, from the custodian to the highest level administrator, is an internal customer.

Both internal and external customers have expectations about what their relationship and experience with an agency should be, and expectations of what services an agency should provide.

As agencies consider how the term "customer" applies to foster, adoptive, and kinship families, they should recognize the unique role that these families play in the child welfare field and the unique relationship that families have with child welfare agencies. These families have characteristics of both internal and external partners, which means they experience being internal and external customers—sometimes simultaneously—depending on the status of their relationship with the agency and the dynamics of each care-giving situation. They are both an external resource to be sought out and treasured, and an internal partner to be respected as an essential member of the child and family serving team. Even when functioning as internal partners, caregivers generally hold less power than agency staff and are more vulnerable due to the emotional and legal complexities inherent in their status.

6 As noted previously, this publication focuses primarily on helping child welfare agencies strengthen their customer service approach to working with foster, adoptive, and kinship families. Child welfare agencies work with many other partners within the child welfare system—including courts, other child- and family-serving agencies, and community partners—so these important partners can be seen as external customers from the child welfare agency perspective, but when looking at the child welfare *system* as a whole, these partners would be seen as internal customers.

Using Implementation Drivers to Affect Change

Implementation drivers—as identified in implementation science—provide a way to explore key elements in achieving organizational change and implementing effective practices and programs. As implementation science tells us, these three drivers are integrated and compensatory, meaning they are closely related and can counter balance each other. For child welfare agencies and systems, this means that they can compensate for areas needing improvement by leaning on the strength of implementation drivers they might already have in place when in the process of developing another.*

Implementation science tells us that many common strategies used to prompt change or promote desired behaviors are insufficient. For example, according to the National Implementation Research Network:

- Implementation by laws and compliance by itself does not work
- Implementation by "following the money" by itself does not work
- Implementation without changing supporting roles and functions does not work**

Competency drivers are "mechanisms that help to *develop, improve, and sustain one's ability to implement an intervention with fidelity and benefits to consumers*. Competency drivers include: Selection, Training, Coaching, and Performance Assessment."[1]

Organizational drivers are "mechanisms to *create and sustain hospitable organizational and systems environments*. Organizational drivers include: Decision Support Data System, Facilitative Administration, and Systems Intervention."[2]

Leadership drivers are "*methods to manage Technical problems* where there is [sic] high levels of agreement about problems and high levels of certainty about solutions and to constructively *deal with Adaptive challenges* where problems are not clear and solutions are elusive."[3]

* Note: Throughout this publication, we refer to many key concepts from the frameworks of implementation science and adaptive leadership. More thorough information about implementation science is available from the National Implementation Research Network (*http://nirn.fpg.unc.edu/*). More information about adaptive leadership is available from Cambridge Leadership Associates (*www.cambridge-leadership.com*).

** Note: These statements from National Implementation Research Network and the definitions for the drivers are taken from: Blasé, Karen, PhD, Devin, Pat, MSSW, Van Dyke, Melissa, LCSW. **"System and Practice Change Through an Implementation Lens."** Presentation to Children's Bureau Intensive On-Site T/TA Workgroup, October 28, 2009.

1 Blasé, Karen, PhD, Devin, Pat, MSSW, Van Dyke, Melissa, LCSW. **"System and Practice Change Through an Implementation Lens."** Presentation to Children's Bureau Intensive On-Site T/TA Workgroup, October 28, 2009.

2 Ibid.

3 Ibid.

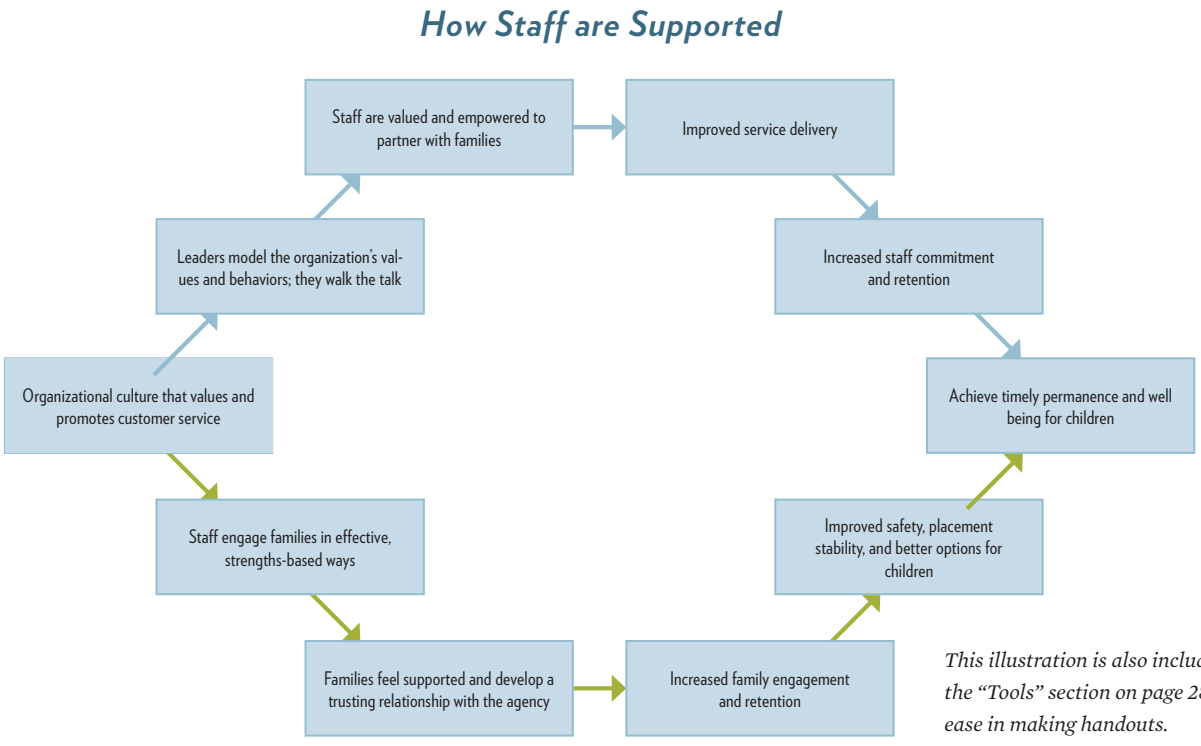
Our model of customer service emphasizes that internal customers are important to the agency's ability to provide services to external customers, ensure that the agency meets external customers' needs, and promote positive perceptions of the agency. Consequently, agency leaders need to attend not only to children and families receiving services, but also to the employees within the agency who directly deliver those services. Agency leaders also need to identify ways to meet the needs of support staff and families who play fundamental roles in service delivery.

The needs of internal and external customers are quite similar. Both desire to:

- Feel respected and valued
- Be considered significant contributors to the challenging work of child welfare
- Receive supports needed to fulfill responsibilities for their role
- Experience opportunities for growth
- Receive timely responses to their needs

An agency that is interested in providing good customer service should create an organizational culture within the agency to support and facilitate good customer service for both internal and external customers. If staff members see customer service principles modeled by their leaders and colleagues—through the agency's organization, leadership, and competency drivers—they will be more likely use those same principles when interacting with foster, adoptive, and kinship families. The illustration below depicts the parallel process of providing good customer service to both internal and external customers.

Customer Service Parallel Processes for Improving Child Welfare Outcomes



This illustration is also included in the "Tools" section on page 28 for ease in making handouts.

FOSTER, ADOPTIVE, AND KINSHIP FAMILIES AS CUSTOMERS

The Unique Role of Foster, Adoptive, and Kinship Families

As emphasized earlier, foster, adoptive, and kinship families are valuable and often misunderstood resources for child welfare agencies. They are asked to provide care, safety, and concrete services in support of children's case plans; however, the level of support necessary for these families is sometimes not consistently available. Foster, adoptive, and kinship families may also view their relationship with the agency in a very different way from how agency staff members view their relationships with the families. It is, in fact, very hard to characterize the unique role that foster, adoptive, and kinship families play within the work of child welfare agencies.

Understanding Foster Families' Role in Child Welfare

Some child welfare staff member think of foster parents as being in roles like that of agency employees, leading to an assumption that it's appropriate to make demands of families to provide certain services for youth in their homes without allowing the families to have input in the service plan. Generally, foster parents are not paid for their time; rather, they receive a daily board rate that reimburses them for some of the costs associated with caring for a child. Other staff members may think of foster parents as clients of the agency, a relationship in which caseworkers and other staff may assume they may exert a certain amount of power over the foster families. Truthfully, there is no other role or relationship quite like that of a foster parent.

Some agencies view the role of foster families as being more similar to that of volunteers, rather than employees, in the delivery of child welfare services. Although foster families may have similar motivations as volunteers, especially in feeling a calling to work hard to care for children, their role is not the same as that of other agency volunteers. As such, foster families can be perceived as both internal and external customers because they are external to the organization but still part of the team working to achieve positive outcomes for children.

Some of the significant factors that support a family's unique role and relationship with the agency include having a positive relationship with their worker, feeling listened to, and being treated as part of the treatment team. A report from the U.S. Department of Health and Human Services states:

> *Interactions with the child welfare agency were the most commonly cited factors affecting foster parent retention. In the National Survey of Current and Former Foster Parents, agency related*

issues, including unsatisfactory interactions with workers and agency insensitivity, were cited as a reason for quitting by 37 percent of former foster parents and 62 percent of those intending to stop foster parenting.[7]

The above factors are even more significant in view of the extremely high turnover rate of foster parents, with some agencies losing 30 to 50 percent of their caregivers each year.[8] As of 2012, in an attempt to respond to these turnover rates, 16 states enacted into law a "Foster Parent Bill of Rights," intended to address many of the concerns expressed by families, including rights to:

- Be treated with respect and dignity
- Receive information about the child placed in the home
- Advocate for the children in their care
- Have access to training and support
- Receive a written copy of their child's case plan
- Actively participate as a member of the case team
- Access services around the clock
- Voice complaints without fear of retaliation

More Information

For information about the states that have adopted a "Foster Parent Bill of Rights," visit the National Foster Parent Association Website at *www.nfpainc.org/Default.aspx?pageId=1105712*.

As child welfare agencies consider developing a culture of good customer service for child welfare work, a foster parent bill of rights may be a good starting point to understand the desired outcomes for foster parents in their role as customers. Legislation, however, is unlikely to improve retention sufficiently unless good customer service is fully integrated into the agency's values, culture, and practices, by addressing competency, organization, and leadership drivers.

Agencies should look beyond a stand-alone parent bill of rights to explore how to embed the underlying organizational values throughout its work. For example, an agency can explore what staff competencies are needed in order for its staff to be able to support a foster parent's bill of rights. This might include having staff training and coaching in place to help staff members understand what it means in their daily work to treat foster parents with dignity and respect. This might also include having staff supervision and performance review guidelines in place to promote and recognize these behaviors.

From Prospect to Potential Partner to Partner

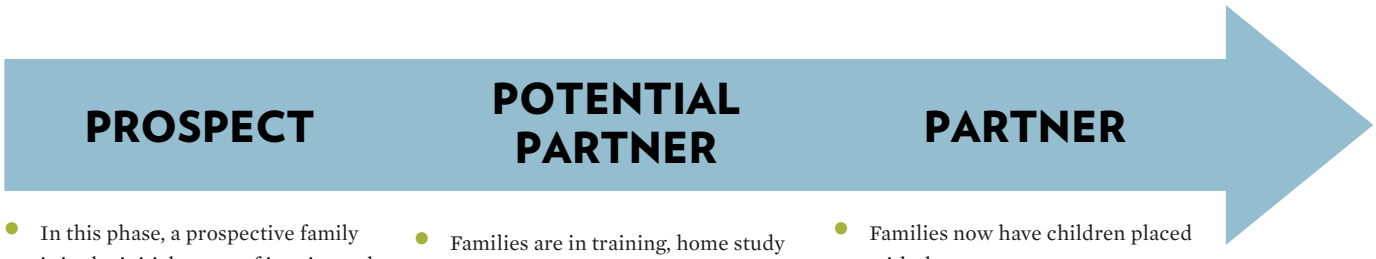
As we look at how foster, adoptive, and kinship families initially come into contact with a child welfare agency, we can recognize that there are developmental stages in the relationship. It's helpful to characterize the relationship as a dynamic and evolving continuum that begins with the family as a "prospect," during which time the family is considering their interest in foster care or adoption and

7 Gibbs, D. ***Understanding Foster Parenting: Using Administrative Data to Explore Retention***(Washington, DC: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation, 2005).

8 National Conference of State Legislatures. (2002). ***NCSL State Legislative Report: Supporting and Retaining Foster Parents.*** Retrieved from *http://www.ncsl.org/issues-research/human-services/ncslnet-state-legislative-report-supporting-and-r.aspx*

is assessing whether they want to work with the agency. Once the family makes a commitment to work with the agency, they continue with the certification process (or approval process in the case of adoption) to become a "potential partner." Ultimately, the family makes the transition to full "partner" or team member in providing services to children in care. At each of these stages, the family is considered a precious resource that needs special attention and support. Understanding the evolving needs of the family during each of these stages is critical to the agency's successful retention of its foster, adoptive, and kinship families.

The graphic below illustrates the evolution of a family's role from prospect to partner:



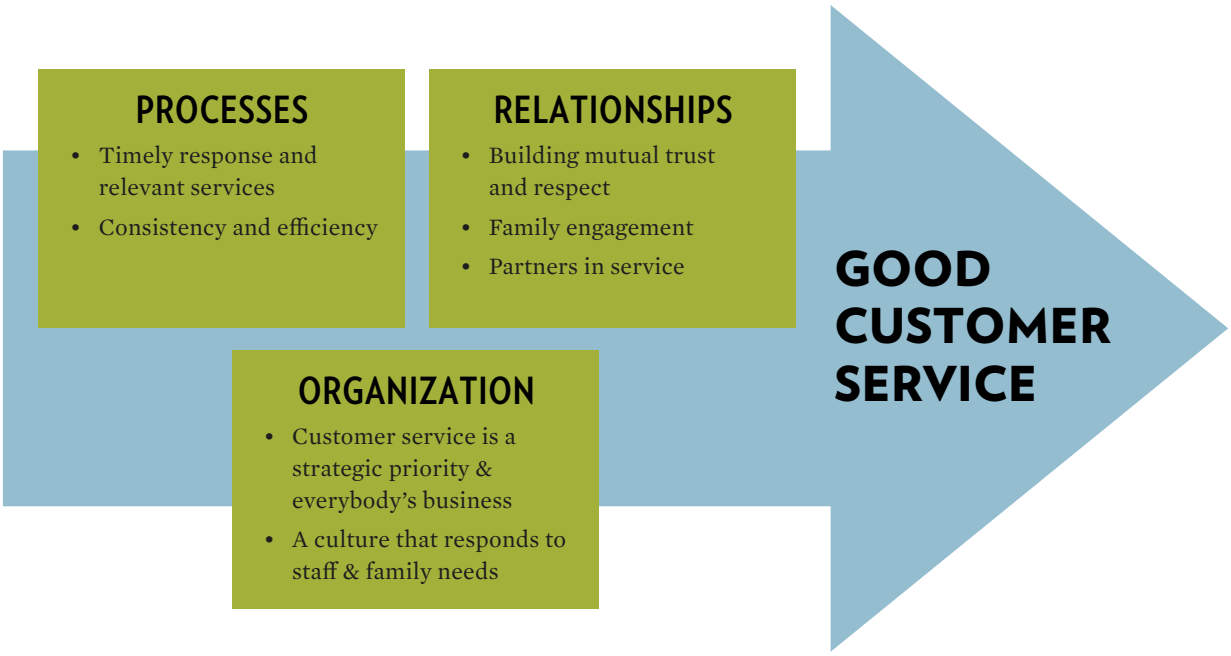
- In this phase, a prospective family is in the initial stages of inquiry and orientation
- During this time, families are **external customers** and tentative about whether or not to engage with the agency and buy-in to foster care, adoption, or kinship care at all.

- Families are in training, home study or approval processes, or waiting for a placement during this stage. The stakes are higher for both the families and the agency.
- Families are still in **external customer** mode, a delicate time when it's key to build trust.

- Families now have children placed with them.
- Families have gained trust that the agency is in partnership with them through demonstrated actions and behaviors over time. Families feel that they are seen and that the agency treats them as important assets. Trusting relationships with agency staff are key at this stage.
- The families are more like team members and **internal customers** now. However, they still have sensitivities and vulnerable times that place them at risk for quitting. Even as partners, they always need to be seen as an organization's precious resource. Although families at this stage have some similarities with agency employees (e.g., they are part of a child-serving team), their role is still distinct from that of an employee and involves different dynamics than those involved between agency leadership and their staff. Families need to trust that they will be able to receive ongoing support from the agency.

THE PRO FRAMEWORK FOR CUSTOMER SERVICE

Good customer service is everybody's business in child welfare—ranging from the reception desk all the way to the administrator's office. It is a key foundation for achieving safety, permanency, and well-being outcomes for the children and youth being served. The PRO Framework (see diagram below) depicts **p**rocesses, **r**elationships, and **o**rganization as key factors that support good customer service in child welfare. Clearly, the processes in which we engage and the relationships we forge are vital components. However, a total organizational commitment from the top down and from staff members at all levels is fundamental to assuring an agency implements good customer service for both internal and external customers.



Child welfare is a professional public service. Providing good customer service in child welfare is both professional and proactive.

PROfessional

- Customer service competencies are congruent and compatible with professional social work values and best practices.
- Customer service core competencies can be taught and applied throughout the agency. They are the building blocks of strengths-based practice.

PROactive

- Good customer service involves:
  - Continuously scanning the environment to hear the voices of customers
  - Anticipating customer needs
  - Going the extra mile in responding to customer needs

As noted earlier, there are three dimensions to consider in customer service, which are a part of our PRO Framework for customer service. Each dimension prompts us to ask relevant questions.

Processes

This dimension refers to the process steps involved and procedures implemented as we deliver child welfare services, such as responding to inquiries in a timely manner, reducing wait time for services, and using processes that are customer-centered. Insuring that processes support good customer service prompts us to ask:

- Are the services your agency provides competent, user-friendly, timely, and helpful?
- Does your agency actively engage families in developing and evaluating processes and procedures?
- Does your agency regularly consult families when it considers making process changes?

Relationships

Effective working relationships are at the heart of the PRO Framework. Putting emphasis on relationship competencies is crucial to assuring delivery of good customer service.

Relevant questions include:

- How do internal and external customers perceive the way they are engaged and treated by everyone in your agency?
- What is the level of organizational and personal responsiveness to internal and external customer needs?
- Do families feel they are respected and truly engaged as part of a team, both before and after having a child placed with them?

Organization

The climate and organizational culture throughout the agency sets the stage for good customer service. It is important to consider the following questions.

- Does your agency put an emphasis on how managers and staff members treat one another to establish a hospitable climate for good customer service?
- Has your agency defined, articulated, and published customer service standards?
- Did your agency actively involve families, staff members at all levels, and other customers in the development of its customer service standards?
- Have staff members and other key stakeholders received training in relationship to the customer service standards and related behavioral expectations?
- Does each individual staff member know what is expected of him or her in relationship to both internal and external customer service?
- Are the standards reinforced through continuous training, role-modeling, supervision, coaching, hiring, and performance reviews and evaluation?
- Does your agency explicitly discuss with staff members how everyone's work is interrelated (e.g., how post-placement support and services help improve recruitment efforts by having families that feel well-supported speaking positively about the agency to their friends and family)?

Using the PRO Framework to plan can help your agency think more deeply about the various dimensions and where to intervene to ensure continuous quality improvements related to customer service. Even in the smallest project or system change effort, you must take all three dimensions of the PRO Framework into consideration.

In any change initiative, it's important to consider how implementation of proposed changes will occur. According to implementation science, there are six stages of implementation.[9] We discuss the stages later in this publication, beginning on page 23, but they are as follows:

1. Exploration and Adoption
2. Program Installation
3. Initial Implementation
4. Full Operation
5. Innovation
6. Sustainability

This PRO Framework is embedded within the first implementation stage of Exploration and Adoption, which involves "identifying the need for change, learning about possible interventions that may be solutions, learning about what it takes to implement the intervention effectively, developing stakeholders and champions, deciding to proceed."[10] In terms of customer service, an agency should explore:

- What would good customer service look like?
- What will it take to provide good customer service?
- How will your agency know when it is or is not providing good customer service?

9 Fixen, Dean L., et al. ***Scaling-up Brief 3: Readiness for Change***. February 2009, Number 3. FPG Child Development Institute, The University of North Carolina at Chapel Hill.

10 Ibid, page 1

Ten Principles of the PRO Framework

Processes

1. **Good customer service is everybody's business.** Providing good customer service is an ongoing continuous improvement process, touching all processes and people in an agency and those served by it. It is more than just a one-time, feel good project. It is the responsibility of more than a single department or a few individuals within an agency. It requires a systemic approach for integrating customer service principles throughout an agency's structures, policies, and practices.

2. **Listening to the voice of the customer.** Providing foster, adoptive, and kinship families with opportunities to provide input and listening to what they say guides customer service improvements. Child welfare agencies need to understand what matters most to their customers, because customers use this criteria to form their perceptions and judge the services an agency provides.

3. **Effective use of data.** Good customer service is grounded in accurate, timely data, and effective data analysis. Knowing the real needs and characteristics of children in care and the pool of foster, adoptive, and kinship families helps agencies in the planning of effective recruitment and retention services.

Relationships

4. **Relationships first.** When families perceive that they are treated in ways that are respectful and responsive, it sustains effective working relationships. True partnerships evolve over time and are nurtured by mutual trust and positive experiences.

5. **Partners in service.** Child welfare is essentially relational. Success in meeting case goals depends on true family engagement and teamwork. Families are more likely to collaborate and be responsive to agency requests when treated as valued members of the team.

6. **Use of power.** Power and empowerment often play a much bigger role in child welfare than in other services because of the dual mandate of protecting children and serving families. Therefore, child welfare professionals must understand and sensitively manage power and authority in all interactions with families.

Organization

7. **Organizational climate and culture.** When leaders, managers, supervisors, and staff create and model an environment of mutual respect, shared responsibility, and partnership, then a foundation is set for the delivery of good customer service.

8. **Empowering style of leadership.** Good customer service requires that leaders empower and support their staff members to carry out competent service delivery. Good customer service must lie in the hands and hearts of all staff members who interact with internal and external customers. There also needs to be an agency-wide commitment to supporting those staff members in providing good customer service.

9. **Meaningful customer service standards.** Customer service standards, priorities, and expectations need to be communicated and reinforced consistently throughout the child welfare agency and community.

PRO

10. **Core competencies for customer service:** The PRO Framework incorporates attitudes, skills, and knowledge (including cultural competencies) that can be learned and reinforced at all levels of the agency to support and sustain good customer services. These competencies recognize the emotional content and highly sensitive nature of child welfare work and build on customers' strengths.

A Structure to Support the PRO Framework for Customer Service in Child Welfare

This section describes an approach that agencies can use to apply the PRO Framework, including the roles of key teams and processes to begin installing a customer service approach within a child welfare agency.[11]

Each component in the above illustration plays a vital role in supporting the PRO Framework:

Executive Management. Executive-level leadership mandates and authorizes the customer service focus. They give it legitimacy by creating and supporting the vision for excellence in customer service and empowering designated leadership team members to implement the necessary changes in structure, service delivery, and accountability to realize the vision. They incorporate their vision into the agency's mission, beliefs, and practice model. They appoint and support the Customer Service Leadership Team (described below) by assuring that the necessary structures and policies are in place. Executive-level leadership is responsive in how it addresses barriers and interagency problems that arise.

11 The teams and groups depicted in this graphic align with core concepts from implementation science about various roles for people and groups in driving and supporting change efforts. The Executive Management team plays the role of the *Sponsor* for the change effort. The Customer Service Leadership Team members are the *Champions* of change. The Supervisors are the *Drivers* for the change effort. The Local Team members serve as *Change Agents*. The people involved in Quality Assurance are the *Change Targets*.

Customer Service Leadership Team. An agency's executive-level leadership creates this component to champion the customer service initiatives in an agency. The customer service leadership team includes a vertical cross-section of agency employees and stakeholders who may be involved in creating the customer service standards and expectations. The leadership team acts as a mega design team who oversees customer service efforts and training. They regularly report to executive-level leadership regarding progress, challenges, needed resources, innovations, and impact on desired organizational outcomes. It is an honor to be appointed to this group; qualifications for appointment include a demonstrated passion for customer service, creativity, and resourcefulness.

Supervisors of Front-Line Staff. Supervision, training, communications, and coaching are crucial to ensuring ongoing infusion of customer service competencies; thus, these should be viewed as organizational priorities. Supervisors are trained in customer service competencies and are engaged in training and coaching their staff members. Customer service skills are evaluated in performance reviews. Supervisors are empowered to make decisions, make things right when they go wrong, and support their staff members in going the extra mile. Storytelling and celebrations honoring customer service excellence are encouraged.

Local Teams. These teams are the people who do the work of making the process and service changes at the direct service level. These teams may be the existing service units or specific cross-functional teams organized to plan and make process changes. The local teams identify and lift up current best practices in the agency and use the plan-do-study-act cycle or a similar process to try out new practices and processes in customer service. They are accountable to local leadership and may report progress to and have links with the customer service leadership team.

Quality Assurance. The voice of customers is actively sought through surveys, listening tours, and other mechanisms. Child Family Services Reviews (CFSRs), and more short- and medium-term measures, are used to monitor the impact of customer service improvements on agency outcomes. It is important to establish and communicate measurable customer service milestones to help an agency's staff assess and appreciate the progress they are making related to the goals.

PRO: The PRO acronym stands for processes, relationships, and organization and is at the center of the Framework. These are the three areas for intervention and integration of customer service changes into the ongoing work of an agency. When discussing change at all levels and assessing and diagnosing what interventions might be needed, leaders will ask, "Is this change about…"

- Making a **process** more user-friendly and efficient?
- Strengthening **relationships** and how we receive and treat families here?
- Improving our **organization's** cultural climate and norms?

When agencies drive improvements concurrently on all three fronts, PRO synergy is at work, and desired changes can be successful and enduring.

THE IMPORTANCE OF CUSTOMER SERVICE STANDARDS

Customer service standards are the operational criteria that ensure the consistent delivery of quality service. They reflect the organization's values regarding service. Child welfare agencies seeking to deliver good customer service need to be intentional in developing customer service standards based on their agency's stated values and practice model. In order to be an effective tool for guiding staff members in difficult customer service situations, the standards need to be prioritized, specific to the work and roles of various staff members, and include clear definitions and details on behaviors that an agency expects of its staff members. When staff members—at all levels, including front-line staff and leadership—know the behaviors that are expected of them to operationalize the agency's customer service standards, they are better equipped to provide good customer service even in challenging situations.

Helpful Tools

The "Tools" section of this publication on page 28 includes an exercise that your agency can use to explore ideas for your agency's customer service standards and an activity to help you identify strategies for obtaining input from stakeholders on your draft standards.

Aligning with Your Agency's Practice Model and Values

Many States, Tribes, and Territories have developed practice models to guide their work with families, children, and communities. A child welfare practice model is "a conceptual map and organizational ideology of how organization employees, families, and stakeholders should unite in creating a physical and emotional environment that focuses on the safety, permanency, and well-being of children and their families."[12] Even if your agency doesn't currently have a formal practice model, your agency likely has clear values and beliefs to guide your work. These values and beliefs should be the basis upon which your agency develops your customer service standards.

Once you develop your agency's customer service standards, you might find it helpful to specify the standards in order of priority so that everyone knows how the standards relate to each other and which ones take precedence. It is also important to provide your staff with details on the behaviors your agency expects of staff in carrying out the standards. To be effective, customer service standards, priorities, and expected behaviors need to be communicated and reinforced throughout the agency. This reinforcement should take place through multiple strategies, including, but not limited to staff training, coaching, mentoring by supervisors and other colleagues, and team discussions about how staff are applying your agency's customer service standards in real situations.

12 National Child Welfare Resource Center for Organizational Improvement and National Resource Center for Permanency and Family Connections. (2008). ***An Introduction to the Practice Model Framework: A Working Document Series***. Pg. 1.

Sample Prioritized Customer Service Standards

The list below provides an example of a set of child welfare agency standards in prioritized order. Your agency might develop very different standards and a different prioritization in order to ensure that your customer service standards align with your practice model, agency structure, and other important initiatives. This list is just an example. Your agency could consider how these standards would apply in real work scenarios that your staff encounters and discuss how staff would apply these standards in their own work.

1. **Safety** – The safety of children, families, and staff is the paramount concern of child welfare agencies and systems.

2. **Respect and Compassion** – Every family, child, and staff member is treated with respect and compassion in recognition of the strong emotions that accompany child custody issues and decisions, and the stress associated with child welfare work.

3. **Mission** – All members of the team—staff members; birth, foster, adoptive, and kinship parents; and children—are engaged in developing, communicating, and carrying out the agency's mission of safety, permanency, and well-being for children and families. When there are differences, all members of the team can use the mission as a foundation for reviewing the case plan, removing barriers, and reconciling differences to achieve timely outcomes in the best interests of the child.

4. **Authority and Power** – Families are provided up-to-date information and engaged in decisions affecting them to the fullest extent possible. Members of the team continually examine their use of power, use of self, and personal biases to prevent inappropriate or unethical use of power and authority in all interactions with families.

5. **Responsiveness and Timeliness** – All members of the team seek to follow through on commitments and meet timelines, carrying with them a child's sense of time as the standard for providing quality services.

IMPLEMENTING CUSTOMER SERVICE CONCEPTS

When we think of implementation, we often think about putting a new practice or program into place. However, fully sustained implementation requires a thoughtful process from conceptualizing an idea to full integration. In order for customer service concepts to fully inform an enduring, integrated service delivery system, agencies must make changes that are "described in sufficient detail such that independent observers can detect the presence and strength of the 'specific set of activities' related to implementation."[13]

In order to achieve this higher level of implementation, agencies must pay attention to both interventions *and* implementation processes. As noted by the National Implementation Research Network:

> *It is common to read about "implementation" of a program or practice as if it were an accomplished fact when the context of the statement makes it clear that some process (more or less clearly described) had been put in place to attempt the implementation of that program or practice. When faced with the realities of human services, implementation outcomes should not be assumed any more than intervention outcomes are assumed.*[14]

The following process is an approach child welfare agencies can use to guide their efforts to further incorporate customer service concepts into their recruitment and retention practices, which may involve broader system changes than only those specific to adoption and foster care programs.

An Implementation Process for Good Customer Service

Implementation Stage	*Who*	*Functions and Tasks*
1. Establish the vision for good customer service According to implementation science, this is the first stage of implementation, "Exploration and Adoption."[15]	Executive level leadership	• Articulate and communicate the vision that good customer service will be embedded in everything the agency does now and will do in the future • Appoint and empower a customer service leadership team to implement the necessary changes to realize the vision • Consider the vision for customer service in relationship to your agency's mission, values, beliefs, and practice model

13 ***"Can Science Survive in the Real World: Implementation Challenges and Solutions."*** Webinar by Karen Blasé, PhD, Dean Fixsen, PhD & Allison Metz, PhD, & Melissa Van Dyke, LCSW. June 23, 2009. National Implementation Research Network.

14 Fixsen, Dean L., et al. ***Implementation Research: A Synthesis of the Literature***. University of South Florida. 2005.

15 Ibid.

Implementation Stage	*Who*	*Functions and Tasks*

2. Assessment[16], diagnosis, and recommendations
This continues the Exploration and Adoption Stage.
	Customer service leadership team	• Become familiar with customer service concepts and the PRO Framework
		• Assess the current situation, collect and analyze the data, conduct listening tours, etc.
		• Create preliminary summary of assessment results, including recommendations about how to instill customer service throughout the agency's culture and all aspects of service delivery
		  ◦ Identify priority customer service issues to address
		  ◦ Recommend how to best engage families, staff, and other stakeholders
		• Recommend initial and long-term scope of work

3. Approval decision This continues the Exploration and Adoption Stage.	Executive level leadership	• Approve, modify, or reject recommendations • If approved, develop a plan for communicating the vision and intention to the agency and create readiness within the system • Authorize the customer service leadership team to continue
4. Planning and design According to implementation science, this is the beginning of the "Program Installation Stage."[17] This stage requires establishing the resources needed to implement changes with fidelity and desired outcomes.	Customer service leadership team	• Develop draft of customer services standards and behavioral expectations • Present draft of customer services standards and engage additional stakeholders (e.g. supervisors; frontline staff; community partners; and foster, adoptive, and kinship families) in feedback process • Revise customer service standards as needed and present to executive-level leadership for final approval • Estimate resource requirements and timeframes • Establish implementation plans including tasks, timeframes, resources needed, specific success factors, and a process for measuring success • Develop an agency-wide communication and competency-building plan • Communicate the plan and make the case to those affected

16 Please note that assessment activities will likely be involved throughout the implementation process, and not limited to one stage.

17 Fixsen, Dean L., et al. ***Implementation Research: A Synthesis of the Literature***. University of South Florida. 2005.

Implementation Stage	*Who*	*Functions and Tasks*
5. Begin customer service improvements According to implementation science, this begins the "Initial Implementation Stage"[18] - the first use of an innovation by newly trained staff and others; sometimes referred to as the awkward stage.	Selected local teams or service units[19] Customer service leadership team	• Select or appoint local teams or service units to begin implementing customer service improvements • Develop local curriculum as needed and begin initial training with roll-out determined by the customer service leadership team • Translate the customer service vision, standards, and policies into the day-to-day work of the participating teams • Identify and promote current best practices in customer service • Use the plan-do-study-act cycle or another method to install new customer service practices and process improvements • Learn from mistakes and celebrate incremental successes • Communicate ongoing progress and lessons learned throughout the agency • Communicate barriers to executive leaders for resolution • Begin work on incorporating good customer service in all aspects of your agency's work, including expectations in policy, hiring, job descriptions, performance reviews, etc.
6. Full implementation According to implementation science, this is a continuation of the Initial Implementation Stage.	Agency-wide customer service teams or service units	• Engage and build competency of all agency supervisors • Incorporate customer service standards into new worker competency development • Provide ongoing system-wide competency building mechanisms, including all staff members • Expand customer service improvement activities throughout the system • Continue to engage courts and other external partners[20]

18 Ibid.

19 These local teams or service units are the people who do the work of making the process and service changes. They may be the existing service units or specific cross-functional teams organized to plan and make process changes. They identify and "lift up" current best practices in the agency and use the plan-do-study-act cycle or similar process to try out new practices and processes in customer service. They are accountable to local leadership and may report progress to and have links with the customer service leadership team.

20 This wording assumes that a child welfare agency is implementing customer service improvements. If a full child welfare system, not just the customer service agency, is implementing customer service improvements, courts and other key partners will be internal customers rather than external customers. In this broader systems approach, the child welfare system should consider who the appropriate external partners would be (e.g., juvenile justice agencies, education systems, etc.).

Implementation Stage	*Who*	*Functions and Tasks*
7. Full implementation This stage is defined by implementation science as "the skillful use of an innovation well-integrated into the repertoire of staff and routinely supported by supervisors and managers."[21]	Agency-wide customer service teams or service units Managers and supervisors	• Implement customer service expectations in all performance reviews • Implement changes in policy and practice • Promote accomplishments and celebrate successes on an ongoing basis • Consistently demonstrate the implementation of the customer service standards system-wide in daily work • Managers and supervisors continue coaching and modeling customer service standards in their relationships with staff members and families
8. Innovation As defined by implementation science, this stage includes "the advances in knowledge and skill that come from evaluated changes in how [staff members] and others make use of science-based intervention."[22]	Agency-wide customer service teams or service units Managers and supervisors	• Staff members, supervisors, and managers are able to recognize barriers to providing good customer service and make adjustments as needed • Good customer service becomes the norm (i.e., the organizational culture)
9. Sustainability Defined by implementation science as "persistent and skillful support for...staff who are using an innovation effectively, with each cohort of [staff members] achieving better results that the last. This sometimes is referred to as 'regeneration' defined as 'the set of procedures that allow a system to continually compare valued outcomes against current practice and modify practices to continue to achieve valued outcomes as the context changes over time.' "[23]	Customer service leadership team Executive level leadership	• Develop and maintain ongoing quality assurance to systematically capture and incorporate feedback in continuous improvements • Continue to evaluate implementation, including consideration of the "voice of the customer," CFSR outcomes, and other recruitment and retention goals • Continue to build supportive internal and external constituencies • Continue to identify and remove barriers • Continue to promote and celebrate incremental successes

21 Fixen, Dean L., et al. ***Scaling-up Brief 3: Readiness for Change***. February 2009, Number 3. FPG Child Development Institute, The University of North Carolina at Chapel Hill

22 Ibid

23 Ibid

ACCESSING TECHNICAL ASSISTANCE ON CUSTOMER SERVICE

The National Resource Center for Diligent Recruitment (NRCDR) at AdoptUSKids is part of the Children's Bureau's Training and Technical Assistance Network. Our purpose is to work with States, Tribes, Territories, and Courts to assist them in building capacity to recruit and retain foster, adoptive, and kinship families for children in the U.S. public child welfare system. Specifically, the NRCDR helps public child welfare agencies:

- Achieve federal CFSR outcomes, particularly related to placement stability, timeliness to permanence, interjurisdictional, and diligent recruitment
- Improve engagement and retention of foster, adoptive, and kinship families

Helpful Tools

The following tools, located in the "Tools" section on page 28, support exploration and assessment of the organization's customer service culture and priorities for change:

- ***Agency Assessment for Good Customer Service***
- ***Is Your Response System Family Friendly?***
- ***Guidelines for Creating Effective Customer Satisfaction Surveys***

One of the characteristics of successful agencies is that they actively seek out best practices and lessons learned from others. However, to be successful at implementing best practices requires more than just identifying and borrowing the practices; it requires adaptation to the agency's culture and full adoption by leadership.[24]

The National Resource Center for Diligent Recruitment at AdoptUSKids is available to assist child welfare agency leaders in both the **adoption** and **adaptation** of best practices in customer service to their agencies. Our training and technical assistance services provide a flexible, customized roadmap for implementing and sustaining intentional system changes that support staff at all levels in providing effective customer service. Our training and technical assistance practice model includes agency-specific assessment and strategic planning. All aspects of the NRCDR's training and technical assistance are designed to support executive-level leadership and members of an agency's customer service leadership team. This support includes helping an agency create customer service standards and implementation plans needed to ensure integration throughout the agency and continuous engagement of frontline staff to improve the delivery of services.

To discuss your interest in receiving training and technical assistance related to improving customer service or any other issues related to recruitment and retention of foster and adoptive parents, please contact us at *NRCDR@adoptuskids.org* or 303-726-0198.

24 Ashkenas, Ron. (2010). **Why Best Practices Are Hard to Practice**. Harvard Business Review. As reproduced on *http://blogs.hbr.org/ashkenas/2010/11/why-best-practices-are-hard-to.html* (accessed 7.9.2012)

Using Customer Service Concepts to

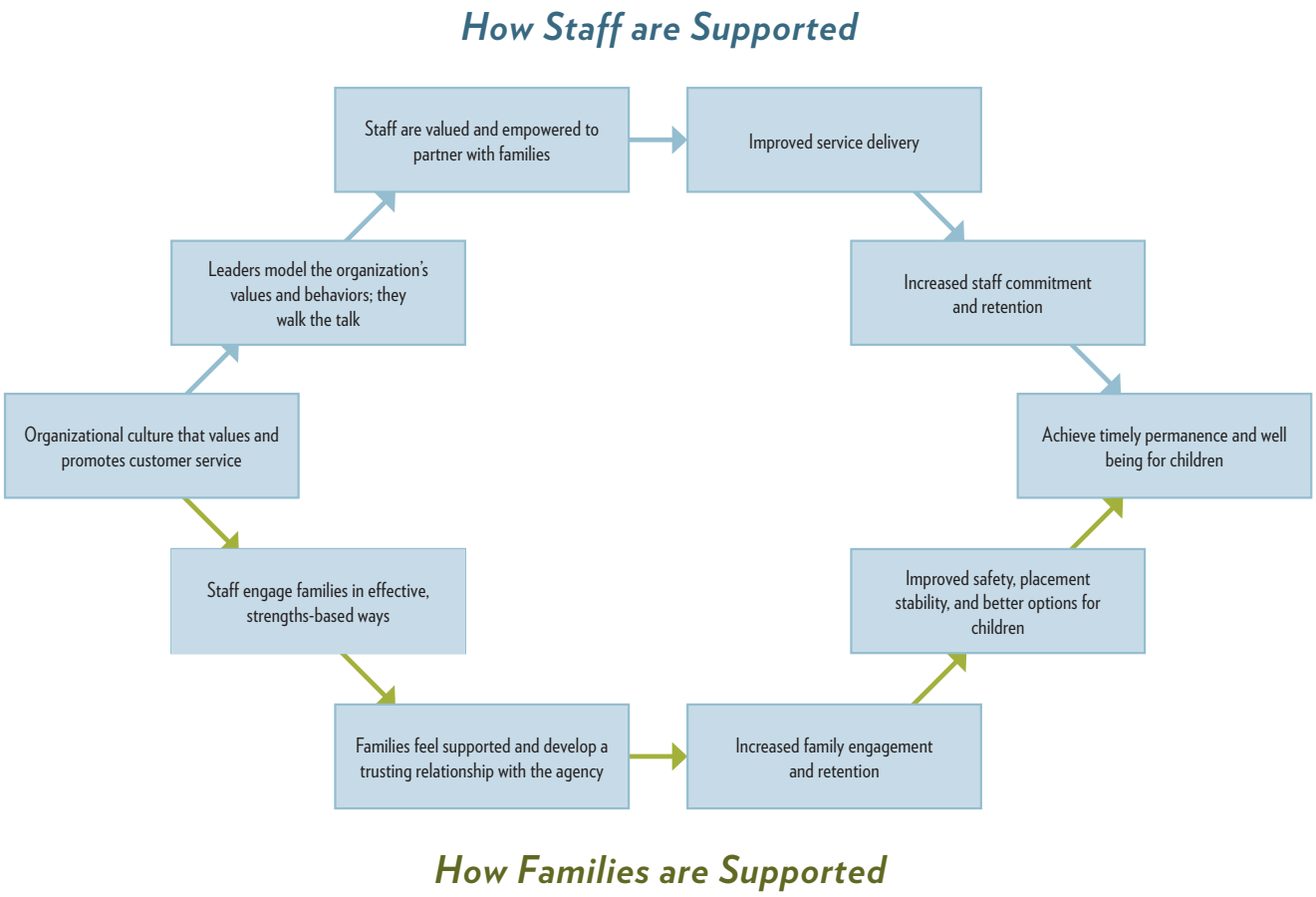
ENHANCE RECRUITMENT AND RETENTION PRACTICES

TOOLS

TOOL

CUSTOMER SERVICE FOR IMPROVING CHILD WELFARE OUTCOMES

An agency that is interested in providing good customer service should create an organizational culture within the agency to support and facilitate good customer service for both internal and external customers. If staff members experience customer service principles modeled by their leaders and colleagues—through the agency's organization, leadership, and competency drivers—they will be more likely to be guided by those same principles when interacting with foster, adoptive, and kinship families. The illustration below depicts the parallel process of providing good customer service to both internal and external customers.



TOOL

USING A CHILD WELFARE DEFINITION OF CUSTOMER SERVICE TO GUIDE ACTION STEPS—ASSESSMENT AND PLANNING TOOL

Part 1—Assess Your Agency's Performance Based on a Definition of Customer Service

As a starting point for your agency's exploration of applying a customer service approach to your recruitment and retention efforts, consider how your agency's internal and external customers would rate your agency in each of these three elements of the proposed definition of customer service in child welfare.

> **customer service:** customers' perceptions of the way they are treated, the responsiveness of the services provided, and the extent to which they are engaged in teamwork to meet the needs of children and youth

Note: If your agency has developed your own definition of customer service to apply to your work, modify this assessment tool to examine how internal and external customers would rate your agency against the key elements or principles of your agency's definition of customer service.

Elements of the Customer Service Definition	***How Customers Would Rate Your Agency***	
	Internal Customers[25]	External Customers[26]
Perception of the way they are treated		
Responsiveness of services received		
Extent to which they are engaged in teamwork to meet the needs of children and youth		

25 Internal customers are the people you work with throughout your agency. They are colleagues, staff members in other agency divisions, and other peers who provide services to you or to whom you provide services (e.g., the financial department staff, licensing workers, data staff, etc.). Put more simply, every staff member within the agency, from the custodian to the highest level administrator, is an internal customer.

26 External customers are the people you do business with outside of your agency. They are the people you serve, collaborate with, and with whom you interact and share your expertise. They include children, youth, birth parents, and extended family members. External customers also include courts and legal professionals, Tribes, contract agencies, cross-system collaborators, advocates, and other community partners.

Part 2—Identify Key Steps and Drivers Your Agency Needs to Address in Order to Implement Improvements

Based on the results of your assessment in "Part 1" on page 30, identify any areas that you would like to focus on improving—for internal customers, external customers, or both—and explore ways to achieve these improvements. Specifically consider whether you need to make changes in leadership drivers, competency drivers, organization drivers, or a combination of multiple drivers.[27]

27 These implementation drivers are discussed and defined in boxed text on "Using Implementation Drivers to Effect Change" on page 10.

TOOL

AGENCY ASSESSMENT FOR GOOD CUSTOMER SERVICE

Agency leaders can use this tool to assess your agency's capacity for providing effective customer service and identifying concerns that might benefit from technical assistance. It reflects the National Resource Center for Diligent Recruitment at AdoptUSKids' practice model for providing technical assistance to jurisdictions that are interested in comprehensive systemic change in customer service.

Use the following rating scale:

1=Strongly Disagree **2**=Disagree **3**=Neither Agree nor Disagree **4**=Agree **5**= Strongly Agree

1. Mission, Vision, and Direction

Our agency has made good customer service an intentional focus and developed a vision and strategies for accomplishing improvement goals.	***Score***
a. Leadership has developed a vision, strategy, and implementation plan for continually improving customer service.	
b. All staff members have a written and well-understood set of standards that define and prioritize good internal and external customer service.	
c. Customer service standards are consistently applied and reinforced throughout our agency.	
d. Our agency makes it a high priority to retain foster, adoptive, and kinship caring families.	
e. A representative leadership group, including internal and external stakeholders, has been designated to oversee customer service improvements.	

2. Culture and Climate

The organizational cultural and climate reflect our agency's attitude toward meeting and exceeding customer expectations.	
a. The physical environment is attractive, clean, and otherwise conducive to meeting and exceeding customer expectations.	
b. Senior managers demonstrate by example the agency's commitment to providing the highest quality service to customers.	
c. Mid and entry-level supervisors demonstrate by personal example the agency's commitment to providing the highest quality of service to customers.	

	Score
d. Respectful and professional interactions among our staff are as important to managers as the respect and professional care we provide to customers.	
e. Staff members are acknowledged, appreciated, and rewarded when they provide good customer service.	
f. Policies and procedures are reviewed and revised as needed to minimize barriers to good customer service	

3. Empowerment

Staff members are empowered to fully meet the needs of their customers.

a. All staff members are authorized to be proactive in ensuring that their customers receive the full measure of service expected by the agency.	
b. All staff members are encouraged to be innovative, take risks, and seek out opportunities to improve services provided to customers.	
c. All staff members are encouraged and expected to take an active role in determining how to improve services to their customers.	
d. All staff members are supported and rewarded for going beyond the call of duty in providing good customer service.	

4. Everybody's Job

Good customer service is practiced by everyone throughout the agency.

a. Good customer service is expected, discussed, and practiced in every department and unit within the agency.	
b. The vast majority of staff members in the agency view discourteous behavior to customers as a situation requiring attention.	
c. Staff members are expected to work with their team members to build spirit, commitment, and mutual support to continuously deliver good customer service.	

5. Performance Expectations

Training and supporting our staff to carry out customer service expectations is a priority for our agency.

	Score
a. Our agency's customer service expectations and core competencies are included throughout all staff training with special emphasis during new staff orientation.	
b. Agency supervisors are expected to continually coach and monitor the customer service core competencies using strengths-based methods.	
c. Our agency has a formal training program with competency-building materials that specifically address both internal and external customer service.	
d. Customer service expectations are included in all staff job and position descriptions.	
e. Performance evaluations include specific expectations for meeting the agency's customer service standards.	
f. The agency recognizes and supports frontline supervisors in their key role of implementing and sustaining good customer service.	

6. Outcomes and Accountability

Our agency has made good customer service an intentional focus and developed a vision and strategies for accomplishing improvement goals.

a. The agency uses the voice of the customer to better understand and make meaningful customer service improvements.	
b. The agency conducts regular satisfaction surveys of families (both prospective and those approved to foster, adopt, or provide kinship care) to determine how services are currently being delivered and how they could be improved.	
c. The agency is effective at tracking and minimizing time from inquiry through placement, while maintaining a fair and customer-friendly process.	
d. The agency has the necessary infrastructure and follows a plan to use data to inform and make continuous program improvements on a systematic basis.	
e. Data regarding the service needs of the customers are regularly collected, analyzed, and distributed to frontline staff for their use in making improvements.	

Look over your inventory. What areas do you see as high priority for your agency to address?

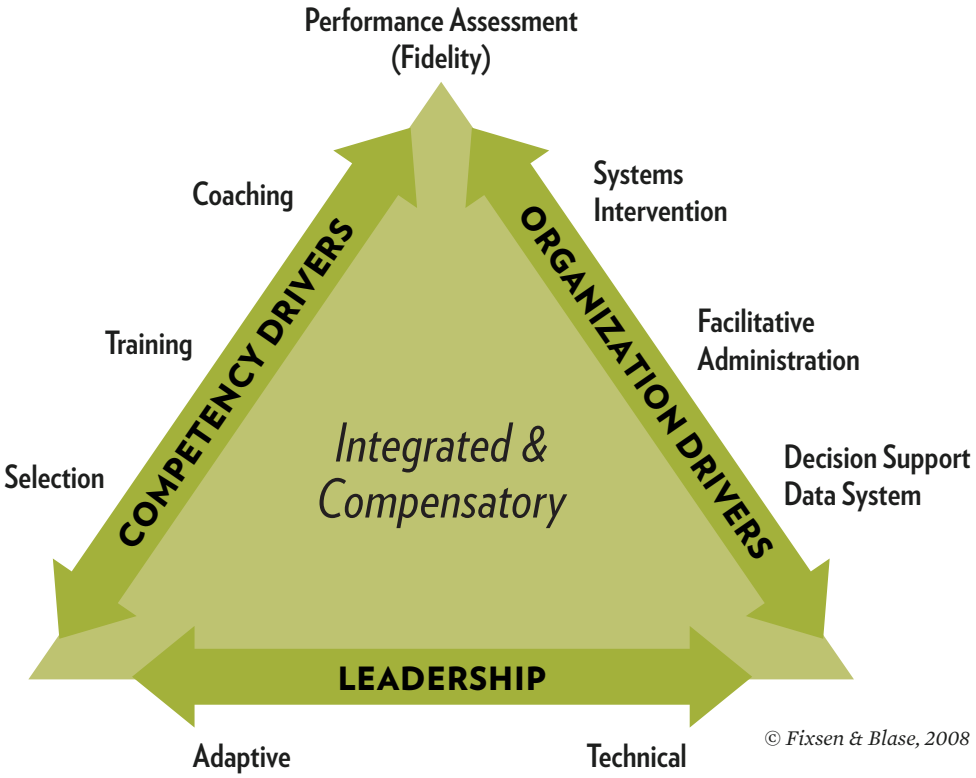
TOOL

ASSESSING AND STRENGTHENING IMPLEMENTATION DRIVERS TO SUPPORT CUSTOMER SERVICE EFFORTS

This tool is designed for your agency's leaders—or customer service leadership team if your agency has one—to assess how well your implementation drivers are promoting and supporting your efforts to deliver good customer service as part of your recruitment and retention work.

For each implementation driver, discuss:

- What are our agency's current strengths and gaps related to our customer service efforts (e.g., How well does our staff selection process work to promote and support our agency's customer service goals and standards?)?
- What are the next steps that our agency needs to take to address the implementation driver in order to support our agency's customer service efforts (e.g., What changes, if any, do we need to make to our data system so that it supports and informs our decisions related to delivering good customer service?)?



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	Driver	*Current Status*	*Next Steps to Develop Capacity to Support Customer Service Work*
Competency Drivers	**Staff Selection**		
	Training		
	Coaching		
	Performance Assessment		
Organization Drivers	**Decision Support Data System**		
	Facilitative Administration		
	Systems Intervention		
	Performance Assessment		
Leadership	**Adaptive Leadership**		
	Technical Leadership		

ACTIVITY

DEVELOPING CUSTOMER SERVICE STANDARDS AND GUIDELINES

The purpose of this activity is to engage participants in developing your agency's customer service standards and behavioral guidelines.

Suggested total amount of time: approximately 45 to 55 minutes (depending on the size of the group)

Directions

Step 1. Ask participants to bring the following to the activity (if applicable): executive management's vision for customer service, your agency's practice model, and your agency's statement of values and beliefs.

Step 2. Ask participants to write down desired customer service behaviors on self-stick notes (one idea per note).

Step 3. Ask the group to post their individual notes on a blank wall. Once everyone has posted their desired behaviors, ask them to group them into categories. Encourage participants to move each other's notes around until they are satisfied they have created good categories. If they move an item more than three times, ask them to duplicate it in one or more categories.

Step 4. Ask the group to put the most important behaviors at the top of the notes posted the category. Once they have done this, ask them to name the category.

Step 5. Ask the group to write a standards statement for each category.

Step 6. When finished with step five ask the group to prioritize the standards. Allow time for discussion about the prioritization and allow opinions about competing priorities to be aired and explored. Ask someone to type up the standards and behavioral guidelines that were developed.

Step 7. Debrief this activity by asking the group the following questions:

- **a.** To what extent does this product align with our agency's practice model (or the agency's statement of values and beliefs, if your agency doesn't have a practice model)?
- **b.** Have we addressed all the key standards that are needed?
- **c.** What changes do we want to make in the wording, etc.?
- **d.** What will be our next steps for getting these standards approved and implemented?

ACTIVITY

DESIGNING YOUR PROCESS FOR GAINING INPUT ON CUSTOMER SERVICE STANDARDS

The purpose of this activity is to engage participants in planning how they will get internal and external input on the standards and guidelines.

Suggested total amount of time: approximately 35 to 45 minutes

Directions

Step 1. Ask participants to design a process for getting customer input regarding their draft standards. Some options include focus groups with both staff and families present, lunch and learn sessions (food provided or brown bag), and visiting existing direct service team meetings.

Step 2. Ask the group to consider or brainstorm what questions they might ask, using the *Questions to Ask Stakeholders about Draft Standards* below to get started. Record these statements on a flip chart.

Step 3. After selecting questions, ask the group to anticipate questions and think about how they would prepare for handling the responses.

Questions to Ask Stakeholders About Draft Standards

Some Possible Questions

- What is our agency doing in customer service that is really working and that we want to be sure continues?
- Do the recommended standards and guidelines address and align with our agency's mission? How or how not?
- Do the recommended standards and guidelines reflect our agency's practice model? How or how not?
- Do these standards and guidelines address the primary needs of external customers? Do they address the needs of internal customers?
- Are the standards and guidelines reasonable and doable, given the work our agency does?
- What revisions, if any, should our agency consider?
- What can we, as an agency, do to support you, as our internal customers, in meeting these standards? *[Note: This question is appropriate for staff as internal customers, but not for external customers.]*
- As we move ahead with our agency's efforts to improve customer service, what are the best ways for us to communicate with you and our agency's other stakeholders?
- How else would you, as a stakeholder, like to be involved in this process?

TOOL

IS YOUR RESPONSE SYSTEM FAMILY FRIENDLY?

This tool will help you consider organizational issues related to each phase of the recruitment and retention process. Answer each of the following questions with a **Yes** or **No**:

Step 0: Recruitment Event	Y / N
0.1 Is there an event planning process?	
0.2 Does the planning process include one or more prospective families?	
0.3 Are experienced foster and adoptive families invited to participate in events?	
Step 1: First Contact	
1.1 Have experienced and/or prospective families been engaged in developing the intake process?	
1.2 Is the person who responds to inquiries family-oriented?	
1.3 Is the person who responds to inquiries familiar with, and trained to address, expectations and fears families typically present?	
1.4 Is there a timely follow-up process for responding to families?	
1.5 Is the intake process audited using a "secret shopper method to assure family responsiveness?"	
1.6 Does your agency begin engaging and supporting prospective families starting with the point of first contact?	
Step 2: Initial Orientation	
2.1 Does someone follow-up with prospective families to encourage them to come to orientation?	
2.2 Is the schedule for orientation meetings friendly to various family schedules?	
2.3 Are the meeting locations easy to find and, if applicable, near public transportation?	
2.4 Are hearty snacks or meals provided with a time for welcoming and conversation?	

Step 2: Initial Orientation (continued)

Y / N

2.5 Is child care made available?

2.6 Are specific requirements of the home study process explained clearly upfront (i.e., background checks, fingerprinting, medical exams)?

2.7 Are special materials or expertly adapted materials provided for special linguistic groups, non-literate groups, and those who need alternate formats?

2.8 Do you provide families with specific information (i.e., current demographic information) about children needing care?

2.9 Do you educate families about specific, common special needs of children who are coming into care, or awaiting permanency?

2.10 Do you present training as a means for families to learn more about fostering and adopting before they make decisions?

Step 3: Pre-Service Training

3.1 Is training offered at times and locations friendly to various family schedules and transportation issues?

3.2 Is training offered frequently enough to keep families closely engaged in the process?

3.3 Is child care made available?

3.4 Does the training team include experienced foster and adoptive parents?

3.5 Are experienced foster and/or adoptive parents included in training activities?

3.6 Is special attention given to planning for diverse populations (i.e., foreign or sign language interpreters, reading assistants, etc.)?

3.7 Are reasonably friendly provisions made for making up missed sessions?

3.8 Is follow-up conducted with families who drop out?

3.9 Are exit interviews (satisfaction surveys) conducted, reviewed, and analyzed?

3.10 Does feedback from families drive quality improvement efforts?

Step 4: Application Process

Y / N

4.1 Is the paperwork simple and straight forward?

4.2 Is the paperwork non-duplicative and streamlined?

4.3 Are special materials or expertly adapted materials provided for special linguistic groups, non-literate groups, and those who need alternate formats?

4.4 Is fingerprinting available on site and processed in a timely way to reduce wait time?

4.5 Does the agency provide assistance to families if they need help filling out paperwork?

Step 5: Mutual Assessment and Home Study

5.1 Is the assessment a mutual process where families are encouraged to be active partners in deciding whether they want to foster or adopt and work with this particular agency?

5.2 Are there enforced timelines and expectations for staff related to completion of the process so it doesn't drag on unnecessarily?

5.3 Is help provided for prospective parents who have fixable impediments (i.e., minor home repairs, beds for children, medical exams, fees, special equipment)?

5.4 Is the family fully informed about: birth family involvement & sibling contact (if applicable), and the special needs of the children they are considering fostering and adopting?

5.5 Are experienced foster or adoptive parents involved as buddies, mentors, or in other roles during this process?

Step 6: Licensing, Certification, and Approval

6.1 Have common barriers to certification or approval been identified and eliminated?

6.2 Does your agency give parents copies of their family assessment or home studies so that they have a chance to fix any mistakes or misunderstandings?

6.3 Are families informed when all the paperwork is complete and licensing or approval has been achieved?

6.4 Is dual licensure and approval used in your area to eliminate duplication of effort and time?

Step 7: Placement

Y / N

7.1 Are prospective families provided information and support while they are waiting for placement?

7.2 Are there support groups available that waiting families can attend?

7.3 Does your agency treat waiting parents with respect and consideration when they call the agency while they are waiting for a placement?

7.4 Are parents encouraged to provide respite and/or emergency care while they are waiting?

7.5 Are parents involved in matching and placement decisions?

7.6 Does your agency provide parents full disclosure of all necessary information so that they can make a fully informed consent to a placement?

Step 8: Post-Placement

8.1 Are families provided clear information and guidance on who to contact at the agency if they need any support or information as they parent the child or children placed with them?

8.2 Are families connected with support groups, peer (parent-to-parent) support options, and other sources for ongoing support as they parent children in their home?

8.3 Does your agency follow up with each family after placing a child to see if the family would like any additional support, referral to services, or information?

8.4 Does your agency conduct assessments and analysis of the post-placement support and services you provide to foster, adoptive, and kinship families in order to ensure that you are providing the support families need in order to meet children's needs?

Check Your Score

Add up the number of questions that you answered with a **Yes**: _____

40 to 53 (75% - 100%)	**27 to 39 (50% - 74%)**	**0 to 26 (below 50%)**
Family friendly	On your way to being family friendly	Needs improvement

TOOL

GUIDELINES FOR CREATING EFFECTIVE CUSTOMER SATISFACTION SURVEYS [28]

Purpose

To provide agencies and organizations with information that needs to be considered in generating customer satisfaction surveys.

Why is Customer Satisfaction So Important?

Consider the following:[29]

- It can cost five to ten times as much effort to attract a new customer as it does to keep one you already have.
- 96 percent of your dissatisfied customers will not tell you.
- 91 percent of those non-complaining, unhappy customers will never come back.
- Dissatisfied customers will tell 10 more people (your existing and potential new customers) of their bad experience.

Define What You Want the Survey to Accomplish

For example, are you looking to get a measurement of **general** customer satisfaction such as determining the gap between a customer's expectations and perceptions of the level of service they're being provided? Or are you looking to measure something **specific** such as how well your agency is performing in the eyes of your customers (e.g., a new training program, the timeliness of your agency's response to new inquiries, etc.)?

Keep the survey simple and focus on factors you recognize as areas of customer concern such as:

- **Understanding the customer.** The degree to which agency staff members know the customer and understand their needs.
- **Technical competence.** The degree to which agency staff members possess the required skills and knowledge to perform the service required.
- **Reliability.** The degree to which agency staff members perform as promised, dependably, and accurately.
- **Credibility.** The degree to which agency staff members are perceived as trustworthy, believable, and accountable.
- **Responsiveness.** The degree to which agency staff members are willing and able to respond to problems and issues.
- **Communication.** The degree to which agency staff members listen to the customer, keep the customer informed, and support the customer through effective presentations.
- **Courtesy.** The level of politeness, respect, and friendliness agency staff members have.

28 This tool was adapted from the works of Brad Sickles, US Dept. of Labor Employment and Training Administration, Performance Accountability Team *www.doleta.gov/performance/trainingtutorials/ppt/roadshow-surveys.ppt* and Craig Borysowich Enterprise Technology Architect *http://it.toolbox.com/blogs/enterprise-solutions/guidelines-for-customer-satisfaction-surveys-19635*

29 Source: *http://www.surveytracker.com/app-custsat.htm?gclid=COqi16OkhKICFeQc5wodBySNDQ*

Construct the Survey

Write Effective Questions

- Develop questions designed to measure the customer satisfaction factors determined in step one on page 43.
- Make the survey form simple to complete, stating each question simply and unambiguously.
- Begin with the end in mind. When considering a question, ask yourself how the responses will be tallied and used?
- If you have doubts about a question, discard it.
- If a question can be misinterpreted by the respondent, chances are that it will be.
- Include only one subject per question.
- Avoid questions that lead people to respond in a certain way.
- Consider optional ways to ask questions that deal with sensitive areas.
- Keep open ended questions to a minimum.
- Consider having a "don't know" response when you create answer sets.
- Create meaningful scales for rating such as the following (note that with this kind of scale, a reasonable target might be to achieve higher than 90 percent of very good or excellent ratings):

  1 = Poor **2** = Satisfactory **3** = Good **4** = Very Good **5** = Excellent

Sequencing the Questions

- The first series of questions should be easy for the respondent to understand and should capture his or her attention and interest.
- Start with general questions and gradually shift to questions that are more specific.
- Group questions in logical sections. Each section of questions should be in a well thought-out order.
- Introduce each new section with a summary statement so participants have an opportunity to adjust to the new set of questions.
- The order of similar items on a list can bias results. Randomly or alphabetically order items and indicate in the instructions how they are ordered, reducing the likelihood that people will see the first items as most important of the group.
- Position questions about personal or sensitive issues toward the end of the questionnaire. Put demographic questions at the end of the survey form.

Other Considerations

- Make sure the time required to complete the survey is short. Try not to exceed more than 10 minutes total time to complete the survey.
- Explain the objective of the survey, what the results will be used for, and that the individual responses will be kept confidential.
- Include space for comments and prompt people to provide comments with a suitable leading question. Probe for further information when respondents are dissatisfied (for example, "If you were not satisfied, what was your expectation and to what extent was this not met?").
- Take into consideration the fact some expectations may be unrealistic. For example, many customers may not agree with a certain state or federal policy. In this case direct the survey question to aspects of the policy that you are interested in, such as:
  - To what extent was the policy explained at project start-up?
  - To what extent did our agency work with you to find mutually acceptable ways to accommodate meeting the requirements of the policy?
- Pre-test the survey questionnaire with a small number of representative customer contacts, and refine it as necessary.
- Tally the responses to the pre-test and prepare a sample report of the results to determine the best way to present them.

Customer Service Elements to Measure

Quality of the product or service itself	***Quality of the way the service is delivered***
• Convenience	• Courteous
• Accessibility	• Professional
• Ease of use	• Attentive
• Overall usefulness	• Friendly
• Timeliness	• Helpful
• Safety	• Knowledgeable
• Reliability	• Prompt
• Accuracy	• Informative
• Thoroughness	• Honest
• Fairness	• Candid
• Appropriateness	
• Attractiveness and cleanliness	

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