

CARES Front Office Staff Focus Groups

Summary of Results

2019-2020

Introduction

In an effort to discover the perspectives and feelings front office staff have regarding the CARES initiative, launched in AISD in 2018, a series of focus groups were conducted during May and June, 2020. Fourteen front office staff participated in total, and each session lasted around 60 minutes. Participants consisted of administrative assistants, bookkeepers, and secretaries.

The questions posed had to do with thoughts and perceptions of front office staff about implementing the CARES initiative. Participants were asked about what works, what doesn't work, and what could be done to improve the CARES program and to support them in their roles as CARES representatives. Participants shared their experiences about what was working and not working, and proposed potential solutions.

The majority of participants (n =11) were from elementary schools (ES), two were from middle schools (MS) and one was from a high school (HS). The additional perspective from the representatives at secondary schools was valuable and showed that campus level may lend itself to modifications to the implementation of CARES.

Themes

Several themes emerged from the discussion, and these themes seemed to be shared by the majority of the participants. Some of the themes were mentioned in all of the focus groups and generated agreement each time they were mentioned, like wanting CARES representatives to spend more than 30 minutes on their campus. Other themes were mentioned only once or twice, like wanting training in managing a campus website. This report follows the flow of the focus groups, including the introduction, key questions and conclusion, and provides a summarized version of the various themes that emerged in participants' responses.

Focus Group Introduction:

Each focus group session began with a statement of the ground rules, including (but not limited to) a statement about confidentiality, encouragement for everyone to participate, and a request not to repeat any sensitive information that would be shared in the discussion. In addition, the participants' verbal agreement to the ground rules, (in which they were told they would be recorded, but their identities would be protected in any reporting and the recording would be erased after it was transcribed) served as their consent to being recorded. Next, the CARES mission statement was read to serve as a reference point for the discussions,

"AISD staff will embrace a culture of positive relationships through creating exceptional customer experiences for students, families, community members and each other."



Introductory Question: Please share your name, school and title, and what kinds of assistance you provide visitors when they come to the front office.

Respondents mentioned a variety of duties, however they agreed that a majority of their time is spent answering the phone, processing information in Raptor, watching visitors come in, and making sure no visitors are going somewhere on campus they are not supposed to. One participant summed it up, "That's really, a lot of responsibility...and very overwhelming."

In addition, several participants seemed to echo the perception that the front office is understaffed. One participant put it this way, "It does feel like the office is understaffed to me. It's always felt that way and I've worked in a couple different campuses, but we have 1200 kids, we've got two front office people and we're constantly on the phone or helping the parents. Constantly. There's not time to do anything else." Other duties mentioned by participants were:

- keeping track of the principal's calendar and appointments
- being the point person for vendors or contractors who come to the campus
- serving as backup for the nurse
- providing assistance to students who have questions or problems
- welcoming substitute teachers
- organizing newsletter
- managing school social media (e.g., respond to parent questions on Facebook page)
- working with custodians
- coordinating events with lessees (those who lease the building)
- accepting items parents drop off for children and notifying the student
- answering the phone (by the third ring)
- payroll (for bookkeepers and bookkeeper assistants)

Key question 1: How do you view yourself (or how do you feel about being) a CARES/customer experience "ambassador"?

Nearly all stated they had good feelings overall about their role as a CARES ambassador. They emphasized the importance of providing good customer service and taking care of their "family." Several participants expressed pride in their role as a CARES representative for their school. Others expressed positive feelings about the CARES initiative, saying it helped them keep customer service at the forefront of their mind.

"I feel **great** about being a CARES ambassador. I **love** interacting with people... Even if I've answered the question 100 times, it's like they asked it for the first time. I'm **happy** to implement CARES. It's the way I was raised; it's **who I am**."

One participant mentioned that providing helpful and kind customer service was just part of the job, rather than a new or

different aspect initiated by CARES. Yet another mentioned that being a CARES representative meant apologizing and owning up to it if you made a mistake or had a misunderstanding with someone (whether it be a parent, teacher, or other office staff member). Another described their role as being the backbone that held everything together and made everything work on campus. Another participant seemed to agree: "I see myself as a bridge between the community and school."

One respondent reported that CARES had a positive impact on office staff and campus administrators because now they know the importance of trying to deescalate highly charged situations with parents or children. This participant also expressed her pride in the welcoming spirit on campus:

"In our office, we get a lot of compliments on how **friendly** we are, and we teach that to anyone working in our office. We have been told a lot about how **welcoming** we are, we make **eye contact** when someone walks in, we are friendly."

Key question 2a: What part of your role in delivering an exceptional customer experience is currently working?

Teamwork and collaboration between front office staff members allowed participants to provide exceptional customer service. Several participants iterated that when the front office team works well together, it made an enormous difference in the ease of their workflow. In all three focus groups, this theme of the importance of cooperation among the front office staff members, of giving each other feedback and support, and of having each other's backs was echoed.

"**Backup** is important."

"We just have each other's **backs**, because we know it is for the good of the office. We want to **see each other succeed**."

"My counterpart and I have worked together for almost 20 years. That is a big huge plus. If you **work together** that long, you **communicate** to meet deadlines and provide **100% service**, and that helps a tremendous amount."

Conversely, one participant mentioned that the high turnover of front office staff was disruptive to ease and workflow, and the others agreed. They reported that what works best is when one or more team member was experienced, and when there were clear expectations for behavior. For example, when a visitor comes to the counter, "you get up out of your seat and greet them." Also, ensuring that all front office staff are trained and that the expectations are set by more experienced staff members was deemed important. Said one, "I lead by example."

Also noteworthy, one participant shared an anecdote about how, even though her job title was principal's secretary, she stayed busy with all the work that needed to be done on the school website. Her principal, recognizing that her multitasking was not working, arranged for her to receive a stipend to do the website work. This was effective because it enabled her to focus on her secretarial duties while at work, knowing she could tend to the website while at home.

Key question 2b: What part of your role in delivering an exceptional customer experience is not working?

A theme in the responses to this question was to provide training on specific topics (including an allowance time off to attend training) and for CARES to reassess what expectations are realistic and relevant for exceptional customer service. To one participant, the directives that came from CARES (e.g., standardize the marquis message or update your email signature) sometimes did not seem respectful to the unique qualities of each campus. Also, the expectation for staff to record a video for training purposes during working hours felt unrealistic.

Other participants mentioned they would prefer to have a professional development day, as do teachers, for training. Many

described how difficult it was to manage several tasks at once: checking in parents; helping the nurse; dealing with unhappy parents; answering phones; and on top of that, having to be responsible for completing a training. One participant mentioned the great volume of foot traffic, saying, "We have between 120 and 200 Raptor check-ins [a technological system for tracking and managing campus visitors] almost every day...It is a whirlwind." The other participants nodded their heads in agreement.

As mentioned, feedback from secondary office staff provided another point of view. For example, at a HS, it was common for students to take the role of office assistant as an elective. In this role, part of their duty might be to answer the phone. The students were trained to do this, had a script to follow, and were supervised by office staff. Therefore, participants suggested it might not be necessary for CARES to request that only staff members answer the phone, at least at the HS level.

Not having enough time to complete their duties and the difficulty of multitasking was a central theme in all three focus groups. Also of note, when one office staff member or the nurse was absent, the challenge increased exponentially. One respondent described it this way: "My day is shot if there is no nurse; nobody gets anything done because you are constantly in there."

Lastly, one participant expressed total support for the vision of CARES as a focus for the district, but said the rubric they were measured by needed to be more realistic. Again, participants mentioned they would like CARES administrators to understand the unique characteristics of each campus and recognize what they are doing well. One said, "Come get to know us, come see what is going on at our campus."

Key question 3: What additional support or resources might be helpful in your growth as a CARES ambassador?

In regard to support and growth, participants expressed a desire for principal support, additional training, and a shared vision across all district departments. Focus group participants often reported that the spirit of CARES did not seem to be shared district wide. They cited examples of calling to speak with someone in Central Office (e.g., Payroll or another Human Resources Department) and not being treated on the phone with great customer service. They felt they deserved to be treated with at least as much care and respect as a parent. One participant expressed the need for a "cultural shift," saying, "While we at the campuses have the general public as our customer, the departments have to remember that they have the campuses as their customer." Another went on to say skills such as active listening, being responsive, handling problems, and advising should be expectations of Central Office staff.

Another suggested that the district give CARES training to everyone on campus "just to get everybody on the same page and have them really truly understand what it truly looks like." Other participants stated they felt alone in their responsibility to implement CARES. Another said she felt uncomfortable about being the one to remind other staff members to smile and be friendly. Lastly, one new staff member said she had not received the CARES training and thought the training should be mandatory for all front office staff.

One participant said that at least one of the trainings offered was not helpful. This came after being invited to a training on how to send an email to a parent. Her response was that if she has been in the position for so many years, then she should be expected to already know how to properly word an email to a parent.

CARES Customer-Service Initiative in AISD

The Human Resources Department in AISD launched the CARES initiative in school year 2018-2019. The concept for CARES was generated from AISD's five-year strategic plan which states their commitment to "creating a positive organizational culture that values customer service and every employee."

In the effort to create a positive culture, the CARES programming team embraces the following principles :

- Customer-Focused,
- Action-Oriented,
- Responsive,
- Empathetic, and
- Service-Driven.

AISD's goal of providing exceptional customer service to all stakeholders (including students, their families, staff, and community members) is believed to lead to positive outcomes. The initiative is also consistent with AISD's goal of retaining teachers and increasing student enrollment.



Others had the following recommendations for professional training (Figure 1):

- Addressing parents who are aggressive or threatening
- Handling situations involving special personnel (counselor, security guard, Child Protective Services, or School Resources Officer)
- Training on the website (creative ideas, making updates)
- Training/mentoring on specific job-related skills (e.g., bookkeeping)
- Managing social media requests and chatter (especially after work hours)
- Communicating with staff and principals on the importance of notifying office staff of events and supporting them
- Using the CARES foundation to set safe, healthy boundaries
- Simplifying what CARES looks like (5 main points) and training everyone on campus

Figure 1

The most frequently requested training topics by the 14 participants were **communicating with staff and principals**, **addressing angry parents**, and **training/mentoring in job-related skills**.



Source: AISD Focus group transcription, 2020

A final sentiment echoed by several participants in multiple focus group sessions was to make principals aware of how important it was to communicate with front office staff about campus events. This was a problem for the front office because if a class or a grade level is having a party or other celebration, many parents may show up at once and all need to be checked in. If front office staff were notified ahead of time, they could plan for it, either by having a volunteer or making sure that “all hands are on deck” at the appointed time. Otherwise, if a front office worker happens to be alone at the front desk when this happens, they could easily become overwhelmed, and the parents who have to wait to be checked in may begin to get cross.

Front office staff preferred to have a schedule of all the upcoming campus events (e.g., assemblies, vendors visiting). Participants requested that the importance of this be passed along to the principals, and hopefully, from the principals to the teachers. One office administrator found a solution and described it in the following way:

"I do an **email every morning** to the campus that states who's coming in and out, what are the events for that day, and if we have any building use people...things like that. That works for us. I got **positive feedback** from that."

Closing question: Please share a story about a CARES/customer experience success, failure, or challenge, and what you learned from it.

One participant shared a story about what her team did when she was going through a hard time in her life. One day, her teammates (including the school principal and other front office staff) asked to have a meeting with her. In this meeting, they gave her feedback that she had been irritable with them and with the campus visitors. They offered their support and asked that she change her attitude. She felt supported by them and was able to talk about her struggle. Because of the support and empathy expressed by her team, she has since been able to give a much friendlier level of service. Since then, the staff at her campus has an unwritten rule to keep each other accountable with their mood and behavior and offer support or backup when needed.

Another anecdote was provided by an administrative assistant who said that when she has clerical reports to finish, she lets her officemates know. They, in turn, place orange cones around her desk to act as a signal for other staff members that she is focused on a time-sensitive task and cannot be interrupted. Other team members pitch in to intercept visitors, phone calls, and questions from staff members.

Key Findings: What can the district do to support you?

The overall purpose of the CARES Programming Department Focus group was to hear firsthand about the experiences of working in the front office of AISD campuses and to understand what these staff members need in order to provide exceptional customer service. The questions created in collaboration with CARES programming staff were: How do you feel about your role as CARES representative? What is working and not working in your role of providing exceptional customer service? What additional support or resources do you need from the CARES team to support you to do your job?

The following are the main findings that emerged from the focus groups.

- Spend more in-person time on campuses (e.g., 2 hours, rather than 30 minutes), get to know us, see how we operate under different conditions, make suggestions based on that
- Make communication and messaging more respectful to staff, adhering to an expected level of professionalism (e.g., acknowledge the positive things we are doing and the effort that goes into our jobs)
- Have more communication from Central Office CARES that involves just checking in and sending support, rather than giving a directive
- Help to form relationships with other front office staff members (e.g., via a technological platform) for all bookkeepers or all administrative assistants to communicate, support each other, and share best practices so the position is not so overwhelming
- Provide training that is accessible at a time other than during work hours (e.g., designate a training day or offer classes online)

- Provide communication training on setting boundaries and dealing with difficult situations
- Don't do audits on campus non-instructional days
- Improve retention of front office staff (e.g., higher pay, evaluate why people are leaving)
- Make CARES a shared vision district wide and campus wide, not just for front office staff; it is a lot of pressure to put on front office staff; the district needs a culture shift
- Simplify the five most important things to do to be a CARES ambassador in your office (i.e., instead of trying to go through every single scenario that may or may not happen, just give five ground rules)
- Allow more people to answer the phone (i.e., students in HS and volunteers, not just those who have been approved)

Conclusion

Overall, most participants expressed pride in their work. Nearly all of them stated that despite the challenges discussed, they had good feelings overall about their role as a CARES ambassador. They clearly understood the meaning and importance of the CARES initiative. They emphasized the satisfaction they experienced from helping people and the importance of providing good customer service, as this quote suggests: "We are the first people that people see when they come to the school. If they don't feel welcome when they come in the office, they may decide not to come to our school!"

Responses such as this demonstrate a level of understanding and buy-in for the CARES principles on the part of front office staff, but more specific training and more overall support are needed. In addition, participants shared that collaboration with coworkers and having a team spirit were beneficial not only to the efficiency of the office but also to them personally. Participants suggested CARES provide an opportunity to leverage the benefit of collaboration by creating a platform for office staff to have a district-wide community of support.

Also of note, participants' feelings about training was a major theme. Specific requests were to allow staff to have paid time off to attend training, for everyone in the district to receive CARES training, and for the CARES team to reassess the type of trainings offered. Of note, front office staff agreed they needed more training in how to communicate in difficult situations and how to communicate to principals about how they could support them.

Lastly, most participants expressed appreciation for the opportunity to participate in the focus groups. They said the focus group was an indication that the CARES team does care about them and wants to support them. In some ways, this helped reach the goal that office staff receive more connection to and acknowledgment from the CARES Central Office. As one participant put it, "I want to tell you thank you for having this meeting. It does show that you guys care and we care enough to be here and take the time to do it."

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August 2020

Publication 19.38