

# Treatment of Clients Policy

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The General Manager will ensure that all clients are treated in a fair and equitable manner by:

1. ensuring that a set of client relations guidelines are in place and are followed, and
2. ensuring that an complaint/appeal system is in place and clearly communicated to clients.

## ***Client Relations Guidelines***

Community Futures is committed to providing the best service possible in a considerate and professional manner.

Courteousness:

- clients will be treated in a courteous and pleasant manner

Accessibility

- office hours will meet the needs of our clients

Responsiveness

- clients will have the ability to see a Counselor in a reasonable time
- responses to applications will be dealt with in a reasonable time
- walk-in and telephone clients will be promptly assisted
- correspondence and electronic communications will be dealt with in a timely manner

Professionalism

- information provided to clients will be accurate and timely
- staff will be well prepared for meetings with clients
- staff will be skilled at accessing a variety of information, both in-house and other sources
- clients will be referred to other appropriate sources where CF staff are unable to help

Confidentiality

- client information will be kept completely confidential

Conflict Resolution

- information on program criteria and processes will be shared with clients
- problems or conflicts will be dealt with in accordance with Community Futures Client Appeal Policy in a timely manner

Follow-up processes will be established to monitor the organization's performance and allow for appropriate service adjustments.

## ***Appeal Process***

The following steps are to be followed by CFDC Clients who are dissatisfied with the service they have received and/or the response to their loan proposal:

1. Staff review – Clients should first insure that they have clearly communicated their concerns to the Staff person involved.
2. Management review – Should a client feel that staff has not satisfactorily addressed his/her concerns, the concerns may be brought to the attention of the General Manager.
3. CFDC Board review – Should a client feel that the General Manager has not satisfactorily addressed his/her concerns, a written appeal may be made directly to the CFDC Board of Directors.

The decision of the Board of Directors is final.”