

**Meeting Date:****December 11, 2006****CSAC members present:**

Art Alexander	Michael Kaplan	Bonnie Morris
Alisa Cour	Kathleen Lynch	Jeremy Van Keuren
Michael Dehner	Michael Mills	Vincent Woods
John Dutt		

**Notes prepared by:** Beth Woodward, CSAC Coordinator, also present**Date prepared:** December 12, 2006**CSAC approved:** January 8, 2007

## Meeting records

The Committee approved notes of the November 20 meeting.

## Follow-up to Mayor's email

To find out about response to the email Mayor Potter sent to Bureau Directors and Commissioners about addressing customer service in their budgets, Jeremy Van Keuren will ask Ingrid Fish, BIP Director, to contact Casey Short, Interim Financial Planning Manager (Short is coordinating the city-wide budget process). The CSAC wants to know how business analysts respond, and perhaps communicate with them. Their questions and approaches may help the Committee determine next steps that are needed.

CSAC expects responses to vary because different bureaus are at different stages of improving customer service. Some members are interested in having bureaus identify their measurable goals in this area.

## Implementation guidelines

To help City bureaus implement BIP recommendations, the Committee began the process of creating a guideline document. Members discussed the characteristics, topics and elements they want to include. Ideas discussed included (underline indicates explicit agreement by Committee):

- A template suggesting appropriate bureau planning
- Guidance about performing surveys. Art Alexander volunteered to draft a description of the type of survey that would be useful as a tool but not as costly as the surveys done for the SEA report, which have a high level of statistical reliability.
- Bureau mission
- Suited to large and small bureaus
- Followup conversation with each bureau
- Tool for education, explaining expectations and answering the question, "why do we have to do this?"
- Perhaps different versions for managers, supervisors, and most employees
- Commonality among bureaus where practical, allowing template modification with involvement of CSAC
- Focus on what is achievable first

Implementation  
guidelines  
(continued)

- How to meet expectations, *e.g.* timely, accurate, ...
- Tools, toolbox
- Benefits of implementing recommendations
- Related recommendations, including recognition of good customer service, and Human Resources' work to incorporate expectations in position descriptions
- How to identify primary customers, and distinguish among passive and proactive customers. What filters are needed?
- What do customers have in common?
- Are customers informed about options?
- Have bureaus share experience, especially those who have used experts
- What do bureaus need to figure out? What steps do they need to take? How can Committee help them make their products tangible?
- Standards by which we (city employees) are held accountable in meeting expectations
- Keep list short—focus on key issues and subcategories
- Start at the beginning—what is customer service? Also say what customer service is not (*e.g.* not just make this person happy right now by waiving requirements)
- Acknowledge that employees are doing a lot right; working to improve customer service does not mean there is a problem. Many customers don't know what we do—we need to educate as well as to adopt a problem-solving approach.

During the brainstorming and general discussion about the guidance for implementation, the Committee generally agreed that:

- The timeline for completing the guidance would be the beginning of the budget process for FY 2008-09—by May or June, 2007.
- When the guidance is ready, the CSAC could sponsor a large forum for managers from all bureaus to meet with the Committee to talk about essential elements, why they are needed, how to move forward, and how some bureaus have already accomplished some of the recommended practices.
- Technical assistance is likely to be needed by many bureaus.
- The CSAC needs to be aggressive and provide clear expectations to avoid having bureaus submit a plan to get CSAC's "blessing" and then ignore it. Consider the content or questions in responses to Mayor's request to include customer service in budget for next fiscal year.
- Guidance needs to be clear enough for Human Resources to use it
- Bureaus may not associate continued or increased funding with good customer service, because often it has been negative feedback that led

Implementation guidelines (continued)	<p>to more funding.</p> <ul style="list-style-type: none"> <li>□ Audience needs to be considered, as well as how to make sure the guidance goes beyond bureau directors. Clarify who is expected to use it.</li> </ul> <p>Art Alexander, Vincent Woods and John Dutt volunteered to prepare an outline of implementation guidance based on today's work, for further discussion at the next meeting.</p>
Possible web page	<p>Woodward asked the Committee to consider what they might want to post on a website, or how they might use one interactively, and told them that Laurel Butman of OMF offered to come to the next CSAC meeting to discuss the possibilities with them. Members said they would like to have her come. They agreed it is too soon to put anything on the City's website.</p>
Agenda for next meeting, January 8	<p>The agenda will include continued work on implementation guidance; discussion of website, led by Laurel Butman, and initial responses to Mayor's email regarding budgeting for customer service improvements.</p>
Miscellaneous	<p>Michael Kaplan suggested that during the time before guidance is ready, the CSAC could help the City prevent escalation of problems that may come up, by preparing and educating employees to respond to issues appropriately.</p>

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- Handouts:
- Meeting Agenda
  - List of CSAC Members (corrected)
  - Meeting Notes for November 20, 2006
  - Draft text for link from City-wide events website

Acronyms:

BIP	Bureau Innovation Project No. 7
CSAC	Customer Service Advisory Committee
OMF	Office of Management and Finance
SEA	Service Efforts and Accomplishments Report, by Audit Services Division