

**Customer Service Advisory Committee****Meeting Notes****Meeting Date:** July 24, 2012**CSAC members present:** John Dutt, Myndi Fertal, George Hocker, Carrie Lathers, Colleen Poole, Ali Ryan, Kim Sneath, Margie Sollinger**Others present:** Tenzin Choephel

Topic	Discussion	Action/ Decision
Welcome new CSAC member	John welcomed Ali Ryan as new addition to CSAC. Ali works at the Portland Parks and Recreation Bureau (Parks), and this is the first Parks representative on CSAC.	
BHR training update	<p>After the meeting in May, Gale Baird, the City’s new Training and Development Manager, John followed up with her regarding a Bureau of Human Resources (BHR) survey on Citywide training needs. John reported that he provided some suggestions based on past CSAC discussions (e.g. interacting with abusive citizens or those with mental health needs). Carrie said Judy Baker Johnson at BHR distributed the survey in late June, and the Revenue Bureau has already met to discuss the contents. John suggested others may want to follow-up with the survey recipient in their bureau to provide input on information relevant to customer service.</p> <p>John also reported that Anna Kanwit, the new BHR Director, has been meeting with bureaus. During Anna’s meeting with Office of Neighborhood Involvement (ONI) representatives, John informed her about CSAC and the recent meeting with Gale. Margie said Anna mentioned an upcoming training on change management. Margie wondered if that curriculum would include customer service, and attendees did not know.</p>	
CRM/311 update	<p>John reported that Commissioner Fritz’s office is coordinating a meeting between Bureau of Emergency Communication (BOEC), ONI and Bureau of Technology Services (BTS) to look at the non-emergency calls (823-3333 line) currently fielded by BOEC. Myndi said the problem has yet to be defined (i.e. BOEC non-emergency calls vs. Citywide customer service integration) and BTS will be tasked to provide cost estimates as these discussions move forward. John said he thought a larger discussion about Citywide service delivery/customer service would need to include all bureaus.</p> <p>George said he is Commissioner Fish’s liaison to Northwest Labor. He said Commissioner Fritz mentioned this work in a recent Northwest Labor meeting. He asked about costs to the City. Myndi said the costs would vary based on the problem and scope of work, with the potential for new infrastructure, licensing, services, movement of people, creation or expansion of a bureau, as well as integrated service tools. John said that, based on other cities of similar size, the infrastructure alone may be \$2 to \$3 million. It would depend on whether the City keeps the services in-house or whether to contract with someone that can host these services.</p>	

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Budget reports

John said Carrie Lathers provided him with the Revenue Bureau report this week. Other follow-up items had yet to occur and will be carried forward to the next meeting.

John will follow up with the elected officials' offices, PBEM and OEHR

Alisa to follow-up with Police

Colleen to follow-up with BPS

Myndi to follow-up with BTS and PDC

John thought that CSAC could begin collection in January/February 2013, and next report to Council in June 2013.

Myndi asked whether coordination was needed with OMF's Financial Planning Division (FPD) if these were budget-related reports. Andrew Scott and/or Jeremy Patton would be appropriate contacts at FPD.

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General updates

Colleen stated that Ross Caron will no longer be serving on CSAC given the change in his duties at BDS. She also mentioned BDS will be hiring 17 permanent employees this fiscal year, and there have been recent changes to their customer service office hours.

Tenzin to reflect this change in CSAC documents

Myndi mentioned recent changes to the City's language translation services. John and Margie said the previous contract was managed by Andrew Bryans in the Auditor's Office, and there were three contracted vendors. With the new contract, there is one vendor – Language Fusion – and Michael Perry in OMF Purchasing is managing the contract. Michael is working with liaisons from relevant City bureaus. Margie and John's bureaus have already used the new vendor and reported that it works well. The vendor offers translation of documents, as well as phone or meeting services.

John mentioned Hively, a web-based customer service tool, referred to him by the Mayor's Office. He mentioned the potential for a presentation by Hively at a future CSAC meeting. John's unit uses the tool when customers email the City. The email signature line includes different emoticons that the customer can then press to represent their level of satisfaction with the City interaction. Myndi suggested looking at the Hively technology, and the data backup in particular, before distributing this information to bureaus.

Myndi said an interactive voice response (IVR) system survey system is currently being tested by the Portland Water Bureau. Customers that call PWB have the option of a warm transfer to a voice over internet protocol (VOIP) customer satisfaction phone survey tool. IVR includes call recording, screen capture and customer feedback features.

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