

## Customer Service Advisory Committee

## Meeting Notes

Meeting Date: January 7, 2014

CSAC members present: John Dutt, Ross Caron, Barbra Rice, Kim Sneath

Others present: Tenzin Choephel

Topic	Discussion	Action/ Decision
New member welcome	<p>John introduced Ross Caron, BDS Public Information Officer, who replaces Colleen Poole. Ross served previously on CSAC but stepped away while he led BDS' Information Technology Advancement Project (ITAP). He will be leading the bureau's procurement for future customer service survey work.</p>	
Customer service budget reports	<p>John recently presented a draft of the customer service budget report at Bureau Directors' meeting held in December. He reported that there were not many questions about the draft. He received subsequent follow-up from two Bureau Directors – Revenue and FPDR.</p> <p>In addition to that feedback, John also reported on other follow-up actions:</p> <ul style="list-style-type: none"><li>Carrie provided Portland Water Bureau's new hire and customer service training modules mentioned in report – John has added these items to the CSAC toolkit (<a href="http://www.portlandonline.com/index.cfm?c=51786">http://www.portlandonline.com/index.cfm?c=51786</a>)</li><li>Tina provided Portland Bureau of Transportation information on Administrative Reviews</li><li>Tenzin provided information on Portland Police Bureau's survey tool for police contacts</li></ul> <p>John has yet to receive information from BTS and BHR, but that may be because the OMF Director's Office is reporting on all of OMF's activities.</p> <p>In terms of next steps, John outlined the following:</p> <ol style="list-style-type: none"><li>Develop cover letter / executive summary for report to highlight trends and 311 project</li><li>Identify CSAC members that will join John during the Council presentation</li><li>Coordinate with the Mayor's Office to sponsor the Council agenda item presenting the CSAC report</li></ol>	<p>John to send email inviting CSAC members to assist with summary and presentation</p> <p>Tenzin to follow-up with Council Clerk and Mayor's Office</p>
CRM/311 update	<p>John informed attendees that Katie Shriver at Commissioner Novick's Office reported that the CRM/311 project has been re-solicited (currently open) after the scoring issue identified by Procurement Services. John anticipated that interviews would be conducted at the end of this month, and consultants begin working in Spring 2014.</p> <p>There will be a Steering Committee for the project. John reported that each City Council member will identify representatives for their office as well as for their bureau portfolio. John</p>	

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recently received a request asking him to serve as one of the representatives for the Mayor's Office portfolio.

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Customer service training    No update.

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General updates    Office 365 implementation has begun with BTS and Revenue in the first wave of deployment. Barbra shared that Carrie Lathers has been receiving BTS training and then training Revenue colleagues.

Barbra also shared that Revenue recently participated in a StrengthsQuest (<http://www.strengthsquest.com/home.aspx>) team-building training. The content includes focusing on employee strengths when communicating job performance.

Kim shared that the City Attorney's Office conducted a customer service survey after taking a break for a couple of years. She reported that there were 112 respondents comprised of Bureau Directors and other City employees that regularly contact the Office. The respondents are not anonymous because the survey collects information on future legal needs and training. Historically, the City Attorney meets one-on-one with Bureau Directors to follow-up on survey results.

Ross mentioned that BTS has begun 360 degree performance evaluations of its staff. Attendees briefly discussed the strengths of this approach and how it is rarely utilized at the City.

Ross also discussed other BDS-related items:

- ♦ BDS will start the procurement process for its customer survey services. There was an initial attempt at developing an RFP but, due to staff turnover, this was not completed. Ross said that BDS used to have a lengthy tri-fold survey but they now plan to use a succinct five-question survey instead.
- ♦ BDS is interested in surveys of regulatory functions since these services solicit different types of responses. Barbra said Revenue has yet to implement a survey for those types of services. John referred to Police since the other bureaus (e.g. Parks, PWB) do not have a regulatory function.
- ♦ BDS received customer feedback requesting contact information for its employees. Ross recently sent an inquiry to PIOs about their bureau's approach.

In response to this last item, Kim asked about public records requests. Ross said that each bureau has its own protocols and there is a need for consistency, particularly when the records request has a Citywide scope. Kim said that her Office is considering using an external resource (Gov Q&A: <http://govqa.com/oursolutions/foia-and-open-records-management/>). Tenzin added that TriMet has launched a new Accountability webpage

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(<http://trimet.org/about/accountability.htm>) which includes a public records request log (<http://trimet.org/publicrecords/index.htm>) that lists the requestor's name, date of request, and description of records requested as well as the request status.

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Next meeting      The next committee meeting is Tuesday, March 4<sup>th</sup> from 1:30-2:30pm.

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