

# City of Portland Customer Service Status Reports Summary for FY 2011-12 (EXHIBIT 1)

## Executive Summary

The Customer Service Advisory Committee (CSAC) presents our fourth status report for City Council's consideration. Our report summarizes the City's customer service efforts and highlights bureau achievements for fiscal year 2011-12.

### **Background**

City Council, as part of adopting the recommendations of Bureau Innovation Project #7, established CSAC with passage of Resolution No. 36438 on **September 13, 2006**. An overarching goal is to monitor, assess and recommend continuous customer service improvements to ensure consistency throughout the City. Since its creation, CSAC has worked with bureaus to improve Citywide customer service by focusing on three key areas:

1. Incorporating customer service elements into bureau mission, goal and value statements as well as strategic plans;
2. Implementing and improving customer service feedback mechanisms; and
3. Developing customer service competencies in the workforce through hiring, performance evaluations, and training.

### **Content Development**

Each year, CSAC reviews bureau updates about customer service efforts. Historically, bureaus submitted this information as part of the annual budget request process. Similar to past reports, the main content is organized by bureau for the reporting period. A two-page rating sheet shows whether bureau efforts are completed, partially completed or not completed. We also identify and briefly summarize any progress across each of the three key focus areas.

It is important to note that this status report is not an attempt to evaluate the quality of the customer service. CSAC focuses on collecting and disseminating information on customer service efforts so that bureaus can learn from each other and develop consistency across the City. We do not have the means to evaluate the quality of customer service being provided.

We also manage content on the City's website ([www.portlandoregon.gov/csac](http://www.portlandoregon.gov/csac)) where we regularly share bureau customer service efforts as well CSAC activities between reporting periods. For example, there is a specific area that serves as a "Customer Service Toolkit" where we showcase examples of outstanding customer service efforts we identify from bureau customer service reports.

### **Observations**

Overall, this year's report shows the rate of customer service improvement efforts have leveled due to budget and resource constraints from recent years. We noted the impact of these constraints to the City's customer service capacity in our 2012 report to Council. Despite these challenges, many bureaus have continued efforts highlighted in prior reports – notably the Parks and Water bureaus. Many bureaus have continued to engage in periodic trainings and program improvement efforts that focus on customer service. Recently, some bureaus have been able to reinvigorate past efforts as their financial situations have improved. Below are examples of these customer service efforts to help describe the range of activities from the reporting period:

#### *Customer Service Trainings:*

- Bureau of Planning and Sustainability's Solid Waste and Recycling Curbside Hotline staff attended a half-day "Great Customer Service" training.
- Office of Neighborhood Involvement's staff participated in a mandatory training focused on how to provide customer service to people experiencing mental illness.

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- Police Bureau's Advanced Academy training included classes on customer service competency and improving community outreach skills.

### *Customer Service Program Improvements:*

- Bureau of Planning and Sustainability implemented a curbside collection e-schedule program to remind customers of service days.
- Bureau of Development Services is implementing the Information Technology Advancement Project (ITAP) to allow customers online access to services provided by the bureau and its partners.
- Bureau of Transportation's modernization of SmartPark cashiering systems, and Parking Enforcement's use of iPad devices to more efficiently track and report problems.
- Water Bureau's enhanced public outreach to improve transparency to customers, and implementation of an automated billing system.

### *Reinvigorated Efforts As Budgets Improved:*

- Bureau of Development Services has seen their budget improve after about six years of budget cuts. They are currently going through a strategic planning process with a customer service emphasis and have focused on adding resources to programs that provide direct services, such as inspection and enforcement programs. They are currently developing customer service surveys and conducting staff trainings after a six-year hiatus.
- The newly created City Budget Office developed a strategic plan, based partially on feedback received from a 2012 customer survey.
- Office of Management and Finance implemented a 2012-17 Strategic Plan and identified "Quality Customer Service" as its first strategic theme. The Office recently sent staff to customer service trainings and is currently developing a customer survey for its bureaus.
- Police Bureau is collaborating with the National Police Research Platform on police-community interactions by surveying community members who have had direct contact with the bureau.
- Bureau of Transportation recently completed some Administrative Reviews, and created a new Business Plan with a focus on public information and public access to information. The bureau recently hired an Administrative Supervisor that is reviewing bureau-wide customer access to services, and streamlining business processes to improve customer points of entry.
- Water Bureau is in the process of implementing an automated after-call customer survey that could be a model for other bureaus to follow.

### **Recommendations**

Currently, the City is limited in its ability to make customer service improvements because it lacks a centralized approach and uses antiquated and/or insufficient management systems. Each bureau manages customer relationships and service requests independently which results in duplication of effort and lost opportunities for streamlining business processes. Currently, there is an effort underway to have a Citywide business process analysis to determine if a centralized customer relationship management (e.g. "311" system) would make sense for the City. We encourage Council and bureau leaders to support this independent and comprehensive assessment of how the City delivers services to our customers and how we may improve in the future.

Furthermore, we hope Council continues to support individual bureau investments in workforce trainings, best practices implementation, customer input and feedback tools, as well as measurement of customer satisfaction with City services. As budgets continue to improve, we encourage Council to prioritize allocating resources to restore frontline customer services and strengthen customer service skills within the workforce.

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- Completed and on-going
- ⊖ Partially completed, in process, or not stated explicitly
- Not completed

	Bureau Practices				Workforce Development		
	Report	Mission & Goals	Strategic Plan	Survey	Recruitment	Appraisal	Training
<a href="#">City Attorney</a>	●	●	⊖	⊖	●	●	●
<a href="#">City Auditor</a>	●	⊖	⊖	⊖	●	●	⊖
<a href="#">City Budget Office (CBO)</a>	●	⊖	⊖	●	○	⊖	⊖
<a href="#">Development Services (BDS)</a>	●	⊖	⊖	⊖	●	⊖	⊖
<a href="#">Emergency Communications (BOEC)</a>	●	●	●	⊖	●	⊖	⊖
<a href="#">Emergency Management (PBEM)</a>	●	⊖	⊖	⊖	⊖	⊖	⊖
<a href="#">Environmental Services (BES)</a>	●	●	●	⊖	●	●	○
<a href="#">Equity &amp; Human Rights (OEHR)</a>	●	⊖	⊖	⊖	●	●	○
<a href="#">Fire / Police Disability / Retirement Fund (FPD&amp;R)</a>	●	●	⊖	○	○	○	○
<a href="#">Fire &amp; Rescue (PF&amp;R)</a>	●	●	●	⊖	●	⊖	●
<a href="#">Government Relations</a>	●	⊖	⊖	●	○	●	⊖
<a href="#">Housing Bureau (PHB)</a>	●	⊖	●	⊖	⊖	●	⊖
<a href="#">Management &amp; Finance (OMF)</a>	●	●	●	⊖	⊖	⊖	●
<a href="#">OMF/Revenue Bureau</a>	●	●	●	●	●	●	●
<a href="#">Neighborhood Involvement (ONI)</a>	●	●	○	⊖	●	●	●
<a href="#">Parks &amp; Recreation (PP&amp;R)</a>	●	●	●	●	⊖	⊖	●
<a href="#">Planning and Sustainability (BPS)</a>	●	●	●	⊖	⊖	●	⊖
<a href="#">Police Bureau (PPB)</a>	●	⊖	⊖	●	⊖	⊖	●
<a href="#">Development Commission (PDC)</a>	●	⊖	⊖	⊖	⊖	●	⊖
<a href="#">Transportation (PBOT)</a>	●	○	⊖	○	⊖	⊖	⊖
<a href="#">Water Bureau</a>	●	●	●	⊖	●	⊖	●

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	Report	Mission & Goals	Strategic Plan	Survey	Recruitment	Appraisal	Training
<a href="#">Mayor Charlie Hales</a>	●	⊖	⊖	⊖	○	⊖	⊖
<a href="#">Commissioner Nick Fish</a>	●	⊖	●	⊖	⊖	○	○
<a href="#">Commissioner Amanda Fritz</a>	●	●	⊖	⊖	⊖	○	⊖
<a href="#">Commissioner Steve Novick</a>	●	⊖	⊖	⊖	○	⊖	⊖
<a href="#">Commissioner Dan Saltzman</a>	●	⊖	⊖	⊖	○	○	⊖

### Rating Criteria

**Completed and on-going** – as of the date of this report, the bureau has provided documentation of their completion of, and significant ongoing efforts in, this category

**Partially completed, in process, or not stated explicitly** – as of the date of this report, the bureau has provided evidence that they are:

- Working toward completion or ongoing efforts of this category AND/OR
- The bureau has indicated that they believe the category has the status of completion or significant ongoing efforts, but information provided by the bureau does not support this (e.g. it is not explicitly stated, does not meet the established criteria)

**Not completed** – as of the date of this report, the bureau has provided no documentation of their completion of this category or has indicated that this category has not been completed nor has significant progress been made.

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[Information based on reports submitted in February 2013 through the budget request process]

### **City Attorney**

**Mission/Goals/Strategic Plans** – Existing mission and goal statements do include good references to customer service priorities as does its 2009 work plan. The City Attorney’s Office’s Improvement Plan includes a 24-hour goal for initial responses to legal inquiries and continues to maintain that goal. The office is in its third year of the reorganization into practice groups. This has assisted attorneys in giving timely responses and providing additional support through information sharing and cross training. Practice groups will work to develop ways to improve timeliness, including providing additional feedback to clients and requesting feedback from clients as well.

**Customer Feedback** – The City’s Attorney Office continues to conduct a survey of the City bureaus every two to three years. There is a current survey planned for September 2013. The survey is sent online to City Council members, Bureau Directors, all Managers and Supervisors, and other employees identified by staff as frequent clients. Survey results are shared with Bureau Directors and discussed in person to address any concerns. The 2010 survey update was highlighted in the last CSAC report to Council.

**Workforce Development** – Hiring processes and performance evaluations contain customer service elements. Annual performance reviews include goals for employees to improve customer service and attorneys are required to identify an item to improve service to its clients in the coming year. Employees are encouraged to attend training classes offered by the City and outside vendors. The City Attorney’s Office implemented a new recognition process at staff meetings to acknowledge contributions of excellence to customers/clients. They also have an employee orientation process that includes a checklist and comprehensive training to inform new employees about City policies and office procedures.

### **City Auditor**

**Mission/Goals/Strategic Plans** – While there is no formal mission, values statement, or strategic planning documents for the City Auditor’s Office, the overall mission of “ensuring an open and accountable government” has obvious customer service implications. Many of the City Auditor’s duties are intended to improve the City’s overall customer service by:

- Identifying ways to provide more timely or better public services (Audit Services Division)
- Resolving complaints about City services (Ombudsman Program)
- Investigating allegations of police misconduct (Independent Police Review)
- Offering an impartial avenue of appeal on City actions (Hearings Office)
- Providing complete and timely information on City Council proceedings (Council Clerk)
- Providing easy access to City records (Archives and Records Management Section)

**Customer Feedback** – The City Auditor’s Office conducts an Annual Community Survey through its Audit Services Division that provides information on community opinions about City services. In 2012, it released its 22<sup>nd</sup> Annual Community Survey Results. In 2010, a new question was added to gauge the general opinion of the Independent Police Review’s effectiveness in monitoring the conduct of Portland police officers. A couple of the Auditors’ Office divisions also conduct more specific customer surveys.

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The Office of the Ombudsman no longer produces a customer service survey due to historically low response rates and, therefore, low confidence in results. They did, however, add a new performance measure of 60 percent of recommendations successfully implemented within the program year. They also manage the contract for the OpenCity Tipline (formerly Fraud Alert Line) and investigate complaints received. In 2009, the Audit Services Division also implemented a customer survey given to all bureaus after completion of performance audits. These results have been helpful in better understanding the perspective of the audited bureaus as well as providing feedback from auditee staff about the audit.

**Workforce Development** – The City Auditor’s Office staff that interact with customers on a regular basis are encouraged to participate in customer service-related trainings offered by the City. The City Auditor’s Office as a whole has not recently embarked on any bureau-wide customer service training efforts. Position interviews include a customer service question, such as in a recent recruitment where applicants were asked for examples of how they practiced high-quality customer service in past positions. Employees are also asked to submit any suggestions on how to improve customer service during annual performance reviews.

### ***City Budget Office (CBO)***

**Mission/Goals/Strategic Plans** – City Council created the CBO (formerly OMF Financial Planning Division) at the end of 2012. The new bureau is operating under a work plan approved by City Council on January 30, 2013. Due to the recent creation of the office, the CBO has not yet completed a strategic plan but reports it will engage in a strategic planning effort later in 2013. In 2012, the then-Financial Planning Division did engage in a strategic planning effort aimed at improving the budget process. This included a survey and feedback meetings with key stakeholders resulting in issue identification, and the development of goals and strategies to address identified issues.

**Customer Feedback** – The 2012 survey used the online SurveyMonkey tool and was useful in gathering feedback from bureau staff involved in the budgeting process. Information from surveys and debriefs with bureau staff is used to improve ongoing budget processes.

**Workforce Development** – There is mention in the report of recruitment or performance evaluation efforts incorporating customer service values. Some staff have recently completed cultural competency, management, and effective business writing trainings.

### ***Development Services (BDS)***

**Mission/Goals/Strategic Plans** – When CSAC began working with bureaus, BDS established itself as an early model because it incorporated customer service into its strategic planning process. This work was well underway in 2008 but, due to budget cuts and staff reductions, was largely put on hold. As the budget situation improved, the bureau has re-committed these efforts and selected a consultant to facilitate meetings with employees and stakeholder groups to help produce plan documents. The expectation is that this work will take place in 2013 with a new plan adopted by late 2013. BDS’ existing planning documents do contain very strong customer service components and many of these old documents were highlighted in past reports.

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As revenue has grown the bureau has prioritized adding resources to programs that provide direct services such as the Enhanced Rental Inspection Program, the Extremely Distressed Properties Enforcement Program and Neighborhood Inspections.

Over the past several years, BDS has also been involved with the Information Technology Advancement Project (ITAP) implementation. BDS reports this new web-based system will streamline many customer processes (e.g. permit application, plan review, and inspections). BDS anticipates to go live in late 2014 or early 2015.

**Customer Feedback** – Prior to 2008, BDS conducted very extensive customer surveys that were highlighted in past CSAC reports. Given budget and staff cuts, BDS has not conducted recent surveys but have set aside funds for a large-scale survey in the FY 2013-14 budget.

**Workforce Development** – BDS includes customer service as a key part of its recruitment and hiring processes. Given budget cuts, BDS' training program has been on hold but there are plans to restart the customer services training in mid-2013. In addition, BDS has a section of its Employee Handbook (Section 3 – Customer Service and Communication with the Public) dedicated to helping employees understand the bureau's focus on customer service. BDS also reports a focus on developing future leaders within the organization because the bureau currently has 48 percent of its employees eligible to retire within the next five years.

### ***Emergency Communications (BOEC)***

**Mission/Goals/Strategic Plans** – BOEC developed and is currently implementing its Strategic Plan 2013-15. Strategic Direction #1 is Relationships and Customer Service, which includes adoption of a customer service curriculum and training for all employees, as well as improved communications with partners. Unfortunately, due to budget reductions over several recent years, BOEC has had to prioritize resources to maintain adequate staffing levels while avoiding overtime costs. This has meant significant cutbacks in call reviews and training.

**Customer Feedback** – BOEC uses an online feedback from its internet home page. While BOEC has not collected a recent customer survey, the Auditor's Annual Community Survey continues to include 9-1-1 as a service, and residents continued to rank this overall service favorably in 2012 (77 percent of respondents indicate a positive rating).

**Workforce Development** – As mentioned above, call reviews and in-service training were significantly scaled back due to limited resources and overtime constraints. Customer service continues to be an emphasis in the recruitment and hiring process.

### ***Emergency Management (PBEM)***

**Mission/Goals/Strategic Plans** – PBEM's 2011-13 Strategic Plan focuses on collaboration/coordination. They place a great deal of emphasis on expanded communication efforts, including community outreach, social media, and the development of a new website. There could be a more explicit mention of customer service principles but this is less critical given their limited direct-service activity.

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**Customer Feedback** – PBEM uses an online feedback form featured on its new home page as a method to solicit customer feedback. They have also increased two-way communications with customers thanks to enhanced social media efforts. The bureau reports it conducts formal evaluations at the end of each training and exercise.

**Workforce Development** – Their report mentions ongoing individual training opportunities, coaching and yearly evaluations but no details or supporting documentation were provided.

### ***Environmental Services (BES)***

**Mission/Goals/Strategic Plans** – BES’s 2011-16 Strategic Plan was highlighted in a previous CSAC report because it includes guidelines and goals for customer service as part of its five Guiding Principles. Moreover, the bureau’s stated values include “Provide responsive, cost effective and reliable services to our customers” and “Work in partnership with the community.” BES has also adopted several other resources – Employee Manual, 10 Management Principles, and division-specific employee expectations – that include strong customer service elements.

**Customer Feedback** – As highlighted in the last CSAC report, BES conducted some focus groups in 2010 using an outside contractor. This project was helpful in determining public attitudes towards the bureau and the services it provides. BES also does extensive surveying of community members affected by various local sewer construction projects. BES uses these surveys to help improve processes to minimize disruptions related to completing necessary maintenance projects.

**Workforce Development** – Customer service elements are included in BDS’ employee expectations documents, customer service-related interview questions, and union represented staff’s formal performance appraisal forms. BES has standing employee committees – such as Labor Management and The Committee for Workplace Excellence – that improve the workplace for both employees and customers. No mention of customer service-related staff training at this time.

### ***Equity and Human Rights (OEHR)***

**Mission/Goals/Strategic Plans** – As a new City bureau, OEHR adopted its first, one-year strategic work plan after extensive input from staff and community stakeholders. OEHR has defined its “customers” as both City employees and City of Portland residents. Specific strategic goals that address customer service include: #3 – Create a citywide and community advisory system to assist OEHR in achieving its mission; #4 – Create partnerships and strong relationship with individuals and communities outside of the City of Portland government.

**Customer Feedback** – The bureau has not yet implemented a customer assessment tool, but plans to ask each bureau to provide feedback on OEHR’s performance. OEHR’s has recently established a Bureau Advisory Committee to help in its performance assessment efforts.

**Workforce Development** – OEHR has recently filled a couple of newly created positions. Customer service was a key component in the hiring process. For example, one hiring criterion was “*Customer Service – Candidates will illustrate an ability to provide customer friendly operations and responsiveness*”

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to city staff and community members.” Staff are evaluated on customer service competency during annual reviews. No mention of staff training related to customer service.

### **Fire & Police Disability & Retirement (FPDR)**

**Mission/Goals/Strategic Plans** – FPDR adopted a mission, vision and values statement in 2009, and its vision statement includes customer service. FPDR successfully migrated its benefits database in 2012 to help improve customer service. Given retiree feedback, FPDR has implemented changes to improve its ability to serve customers – for example, it is raising its online presence (new website anticipated in 2013) and revising policies that impact pension payment dates.

**Customer Feedback** – In 2012, a survey was distributed to retirees via the FPDR newsletter; active members received an email with a link to an electronic survey. The response rate of 14% was more than double that of 2010, with a higher response rate from active members than retirees. Overall satisfaction was down, because active members rated their satisfaction lower than retirees did.

FPDR has point-of-service surveys for pension estimates, the pension workshop and the retirement process. In addition, they have performance measures for the timeliness and accuracy of pension estimates and for the number of days to make a disability claim decision.

**Workforce Development** – During 2012, the FPDR claims department was restructured, a new manager selected and a new employee hired. During the restructuring, the Bureau stressed the importance of offering excellent service to assure that the changes did not negatively impact our customers.

### **Portland Fire & Rescue (PF&R)**

**Mission/Goals/Strategic Plans** – As previously highlighted by CSAC, PF&R operates under its 2010-15 Strategic Plan. The strategic plan was the result of a collaborative effort across stakeholders. Several goals include customer service elements, most notably “Goal #8 – Enhance Business Model to Increase Customer Responsiveness.” In 2005 and again in 2011, the bureau hired a contractor to complete a service delivery assessment of the fire and emergency medical systems. The 2011 study focused on the feasibility of developing a rapid response program, which was ultimately implemented in April 2012. These Service Delivery Studies can be viewed on the bureau’s website at <http://www.portlandoregon.gov/fire/58725>.

**Customer Feedback** – PF&R has not conducted a comprehensive customer service survey since 2010. But, a customer survey was conducted in 2011 to gauge satisfaction, and solicit suggestions for online service and information improvements. The survey sampled 173 customers and had a 24 percent response rate. PF&R also continues to be included in the Auditor’s Annual Community Survey where 87 percent of respondents ranked fire and emergency services as good or very good – the highest rating of any City bureau in 2012.

**Workforce Development** – The bureau conducts ongoing training for Fire Fighters, Lieutenants and Captains on a monthly basis. In 2012, Fire Fighters participated in trainings related to improving emergency medical service delivery to patients, hazmat response to protect public health and safety, and high-rise training.

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### ***Governmental Relations***

**Mission/Goals/Strategic Plans** – While there were no bureau mission, goal statements or work plans provided, the Office’s report indicates its primary customer service goals have been to improve its public involvement efforts and offer additional resources to internal customers. The Office has also been working on a secondary goal to identify and expand efforts to other customers, such as other local elected officials and their staff, other intergovernmental organizations, and the general public.

**Customer Feedback** – The Office conducted a customer service survey of City customers in August 2012. The survey was sent to 208 City customers and the response rate was 31 percent. Overall, the ratings were very good to excellent – for example, about 86 percent of customers rated quality of customer service as “excellent” or “very good”; and about 68 percent of customers indicated that the office helped facilitate federal, state, or intergovernmental successes for its bureau or office in the last 12 months.

The Office is using the survey results to target improvement in areas where it received lower rankings. These improvement areas include: making technical legislative language more accessible, updating distribution lists more often, and helping bureaus/offices develop strategies to achieve desired outcomes.

**Workforce Development** – The Office encourages staff to participate in workforce development opportunities but, due to high workload, it is often difficult for staff to take time to participate in these opportunities. The Director conducts annual performance evaluations.

### ***Portland Housing Bureau (PHB)***

**Mission/Goals/Strategic Plans** – PHB’s current 2011-13 Strategic Plan includes some strategic goals that speak to customer service including:

- Goal 2.C: Increase participation by minority-owned and economically-disadvantaged firms in the economic opportunities created by PHB investments.
- Goal 4.B: Establish and meet highest standards for customer service and regulatory compliance.
- Goal 4.C: Provide community with clear, consistent, reliable data on Portland’s housing needs and trends and on the performance of PHB’s programs and projects.
- Goal 4.E: Ensure that a wide range of perspectives inform PHB’s agenda, decision-making and policy-setting.

PHB’s mission and values statement could include a more explicit customer service value. PHB is managing efforts to meet these goals via a comprehensive implementation plan. The Business Operations Section has adopted an employee expectations document that has customer service as the first priority – CSAC highlighted a prior version of this document in a past customer service report. As part of its equity emphasis, PHB is modifying its contract processes to lessen the disparities in accessing PHB’s services.

**Customer Feedback** – PHB has not yet undertaken a formal customer survey in the past year but plans to conduct one. PHB receives feedback and help in setting priorities through a variety of advisory bodies

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such as the Portland Housing Advisory Commission, the Equity Council, their Contract Management Workgroup, and public involvement in its annual budgeting process.

**Workforce Development** – PHB prioritizes hires that strengthen the bureau’s customer service foundation by recruiting candidates with a deep knowledge of customer service, public funding stewardship, business process improvement, and data reporting. PHB reports that each member of its administrative staff is held accountable to the bureau’s “Business Operations Expectations” document. In addition, each staff member is evaluated on customer service competency as part of an annual review. PHB is currently in the process of developing a bureau-wide training plan that will include a customer service skills component, and individualized training plans will be developed with employees. PHB has also established a \$10,000 training fund for AFSCME Local 189 employees as stipulated in the collective bargaining agreement.

### ***Office of Management and Finance (OMF)***

**Mission/Goals/Strategic Plans** – OMF recently completed the development of its 2012-17 Strategic Plan which includes “Quality Customer Service” as its first strategic theme. Strategies for this theme include improving communications, assessing customer satisfaction, conducting customer service training for staff, and developing customer service tools to help customers navigate services. The strategic plan was developed by gathering input through extensive research and input from customer surveys and focus groups. The CSAC finds this an excellent example of a customer service emphasis in developing guiding documents for a bureau.

**Customer Feedback** – OMF reports that extensive customer outreach was conducted as part of its 2012 strategic planning effort. OMF collected feedback from key stakeholders (Elected Officials, Bureau Directors, OMF employees, businesses and other community customers) through surveys, focus groups and individual interviews. OMF plans for a customer survey in 2013. Several bureaus and divisions independently survey customers – within OMF, this includes the Bureau of Technology Services, Human Resources, City Fleet and Risk Management.

**Workforce Development** – In 2012, OMF’s Diversity Committee organized two trainings for all OMF staff. The first training was “Emotional Intelligence: Improving Communications and Customer Services” (attended by 83 employees) and the second was “Unconscious Bias in the Workplace” (attended by 97 employees) These trainings were both conducted by Figure 8 Consulting and materials can be found online (Emotional Intelligence <http://www.portlandonline.com/omf/index.cfm?c=58723&>; Unconscious Bias <http://www.portlandoregon.gov/omf/index.cfm?&c=58721&>). The Bureau of Human Resources (BHR) has been working on a couple of Citywide customer service training initiatives which should have a beneficial impact. OMF reports that BHR has implemented a City Learner module in SAP that will make it easier to access and track training records, and introduced a Talent Development Program to help bureaus support employee professional growth.

### ***OMF Revenue Bureau***

**Mission/Goals/Strategic Plans** – The Revenue Bureau is operating under the OMF Strategic Plan. Revenue continues to have an ongoing emphasis on customer service through its monthly peer awards program, weekly sectional meetings, monthly all-staff meetings, and newsletters.

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**Customer Feedback** – The bureau continues to solicit customer feedback by using both walk-in and online surveys for all Revenue Bureau customers. They are also in the planning stages of implementing an after-call survey of customers that phone the bureau. They hope to piggy-back on Portland Water Bureau’s after-call survey tool. They are also working on offering customers the option of completing surveys online for all Revenue Bureau programs. The most recent walk-in survey data shows customer satisfaction at an all-time high.

**Workforce Development** – Over the past couple of years they have had staff participate in several customer service-related trainings. These trainings included “Communications Training,” “Toxic Talk” in the workplace, “Preventing Escalated Calls,” “The Solution for Good Customer Service” as well as ongoing telephone skills review. They are also working on trainings focused on email correspondence and etiquette. The Call Center Supervisor will be attended the “Intentional Coaching Boot Camp” in 2013.

### ***Neighborhood Involvement (ONI)***

**Mission/Goals/Strategic Plans** – In 2010, ONI revised its bureau mission and worked with its Bureau Advisory Committee to developed goals and values. The values identified explicitly integrate components of customer service improvement. For example, “We value our community relationships and show it by being flexible and listening – ensuring timely, accurate and helpful responses to those who work with us or seek our services” and “We seek to maintain the highest community trust through accountability and transparency in our processes and decisions.” At this time, the bureau is not currently operating under a strategic plan.

**Customer Feedback** – In 2010, ONI worked with the Auditor’s Office to incorporate some community involvement questions in the Auditor’s Annual Community Survey to help give some feedback on progress toward ONI’s goals. Some ONI programs such as the Neighborhood Mediation program includes a client survey post-mediation services to help determine satisfaction with services rendered. ONI has not conducted any formal bureau-wide customer service surveys due to funding limitations. As a small bureau with lots of different types of customers, ONI plans to start some formal customer feedback mechanisms at program levels.

**Workforce Development** – In 2012, ONI conducted a mandatory bureau-wide training on effectively working with people with mental health issues and challenging needs. The management team and equity committee plan to conduct additional staff training through periodic all-staff meetings. Management works regularly with staff to provide feedback and coaching in how to respond to issues, dealing with difficult situations, and general customer service skills.

### ***Portland Parks & Recreation (PP&R)***

**Mission/Goals/Strategic Plans** – As highlighted in prior CSAC reports, Parks has done extensive work embedding customer service in its policy guiding documents. PP&R developed its 2012-15 Strategic Plan, and continues to include “Improving Service Delivery” as a Key Result Area. The bureau developed a system-wide “Standard of Customer Service” that establishes a baseline for service, guides service delivery methods, and helps identify opportunities and tools for improving service. PP&R has also

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established an external “Communication Standard,” “Internal Communications Standard,” and a Public Involvement Manual (2009).

**Customer Feedback** – PP&R annually surveys customers that have registered for a recreational activity within the past 12 months. In 2012, PP&R expanded survey methods to include mail, email and on-site distribution. As a result, participation levels increased 150 percent and results continue to be very positive. One notable area of improvement has been survey respondents indicating a greater level of satisfaction with the affordability of programs. PP&R also added a “marketing preferences” question to the survey to get a better understanding of how customers prefer to receive information. In addition to the annual survey, PP&R collects customer satisfaction surveys, comment cards and course evaluations at all sites and classes. Moreover, PP&R’s VISTA (Visitor Information, Survey, Trends and Analysis) program helps coordinate, administer and analyze various types of research and surveys to better understand user patterns, preferences and priorities. Developed in 2006, the VISTA program is a valuable tool for decision-making processes. Other tools used as part of this effort are intercept surveys of parks and trail users as well as randomized surveys. Lastly, ParkScan continues to be a useful online tool for community members to report maintenance concerns to Park Supervisors.

**Workforce Development** – PP&R’s ongoing BEST staff training program provides consistent staff support in service operations. In its third year, the training program ties curriculum to feedback given by customers. PP&R Customer Service Center staff participate in a training series called the “Customer Service Excellence Program” which covers every detail of the customer relationship with a special focus on phone communication techniques. The bureau also has a new employee orientation, which includes a customer service component. PP&R reports that customer service competency and experience are essential parts of its recruitment and hiring processes.

### ***Planning and Sustainability (BPS)***

**Mission/Goals/Strategic Plans** – BPS’ 2011-13 Strategic Plan was highlighted in a past CSAC report. The plan identifies ten stated values, a number of which relate directly to customer service (e.g. “Responsive customer service”). BPS puts great emphasis on outreach and engagement in its planning and development work. For example, BPS highlighted its efforts with the District Liaisons Program and the development of a Community Engagement Guide and Workbook for staff to use. Several customer service program efforts undertaken in the past and planned for the near future include:

- Curbside collection e-schedule (<http://www.portlandoregon.gov/bps/54938>) was created for customers to sign up for garbage day reminders – over 5,000 subscribers have subscribed to this service.
- A mobile-friendly version of the garbage, recycling and composting website is under development.
- Solid Waste and Recycling residential administrative rules are currently being revised, and will include additional payment options and better communications.
- New project focusing on renters to ensure better information about service options and program material offerings.
- Collaboration with the Office of Equity and Human Rights staff to develop a suite of equity tools and resources to help BPS staff analyze how programs/projects can create solutions to address disparities.
- Starting FY 2013-14, BPS’ customer service and administrative support units will be united into one team.

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**Customer Feedback** – There has not been any recent bureau-wide customer service-related surveys but individual programs do solicit customer feedback. For example, evaluation forms are given out following community events (e.g. advisory committee meetings, Fix-It Fairs, etc.). BPS has also made recent improvements to the residential and commercial customer complaints database and the Curbside Hotline call tracking systems. The Sustainability at Work group is developing a customer service survey for 2013, and the Construction and Demolition Program is developing a survey of permit applicants.

**Workforce Development** – BPS reports that workgroup supervisors include customer service as a key element in recruitment and hiring. As appropriate, employee performance evaluations include customer service as a measure of performance. BPS uses the following customer service criteria:

- Effectively provides customer service to both internal and external customers.
- Helps others achieve success while managing priorities.
- Recognizes customers' interests and needs and works to ensure they understand necessary details about projects and bureau work that will enhance collaboration and partnerships.

Four staff members responsible for the Curbside Hotline attended a half-day training, "Great Customer Service," offered by Portland Community College. In addition, a curbside hotline manual was developed and includes frequently asked questions and answers for Hotline staff.

### ***Portland Police Bureau***

**Mission/Goals/Strategic Plans** – The Police Bureau's report made no mention of any recent work with organizational strategic planning related to customer service. They are still operating under the prior 2007-12 Community Policing Strategic Plan, which was previously highlighted in a CSAC report.

**Customer Feedback** – The Police Bureau has not recently conducted its own customer survey, and has relied on the Auditor's Community Survey to gain perspective on customer satisfaction and perception of how safe residents feel in Portland neighborhoods. The most recent results have been consistent with past results. The Police Bureau is working with the National Police Research Platform (NPRP) on two surveys. The first survey is a police-community interaction survey that began in the summer of 2013. This is a survey of citizens having contact with the Police Bureau because they have been victims of certain crimes, a traffic crash, or received a traffic citation. The bureau is also planning an internal survey of sworn and non-sworn personnel in late 2013.

**Workforce Development** – In 2011-12, the Police Bureau's Advanced Academy training included classes on customer service competency and improving community skills. Additionally, racial equity training was developed and delivered.

### ***Portland Development Commission (PDC)***

**Mission/Goals/Strategic Plans** – The PDC strategic plan stresses the importance of equity and the partnerships in its program delivery. PDC's customer service efforts focus on cultivating partnerships and reaching out to the community. In January 2013, PDC launched a new user-friendly website to make it easier to access information on its programs and products.

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**Customer Feedback** – The PDC’s primary means of soliciting community input and feedback is through its advisory committees. These committees include Urban Renewal Advisory Committees, Neighborhood Economic Development Leadership Group, and Traded Sector Industry Advisory Group. Overall, PDC reports it will continue to look for opportunities to broaden citizen involvement. No formal feedback surveys are being used at this time.

**Workforce Development** – PDC recently negotiated a new labor contract that it feels will allow it to create an environment that values diversity and fosters productivity, learning and growth of its workforce. Key actions include creating opportunities in training and career development, cultivating a culture of transparency, and fostering a collaborative relationship between labor and management. Performance appraisals include an evaluation of customer service and partnership.

### ***Portland Bureau of Transportation (PBOT)***

**Mission/Goals/Strategic Plans** –The report indicates that public outreach/participation and customer service are necessary to meet its mission to plan, build, manage and maintain an effective and safe transportation system that provides people and businesses access and mobility. PBOT has recently developed a business plan. The plan contains a strategic action to develop additional public information materials to improve public access to objective information and create greater understanding of what PBOT does. Specific program efforts geared at customer service improvements were also noted, such as parking technicians being equipped with iPads to better track and report problems with pay stations and the modernization of the SmartPark automated cashiering systems. PBOT also launched a new website in June 2012.

**Customer Feedback** – PBOT reports that it actively engages with stakeholders (via public outreach, media engagement and feedback and follow-up with customers) to ensure the varied needs of customers are incorporated before and after project completions. PBOT also indicates it is incorporating customer feedback in longer-range planning and revising current program processes and streamlined processes, however, no further details were provided about how this feedback is solicited and received.

**Workforce Development** – PBOT reports that customer service is highly valued in its recruitment process. For example, the Parking Enforcement Division incorporates a strong customer service element in job announcements, screening processes, and interviews. Parking Enforcement also identifies specific customer service methods during its one-on-one training of employees. Outside the Parking Enforcement Division, PBOT reports peer-sharing and some individual staff participate in learning opportunities hosted by professional organizations or webinars. PBOT is also refocusing on front-line customer service by implementing recommendations from a recent Administrative Review. This effort will ensure bureau support functions are carried out in a consistent and reliable manner and that administrative employees are given adequate professional development opportunities. The review recommended a hybrid/matrix management structure for the administrative team to maximize limited resources. A newly hired manager will be tasked with a number of initiatives to streamline business processes and improve customer points of entry.

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### **Water Bureau (PWB)**

**Mission/Goals/Strategic Plans** – PWB’s vision, mission and values statements were incorporated into its most recent Strategic Plan. As highlighted in prior CSAC reports, PWB provides an excellent example of how bureaus incorporate strong customer service elements into guiding documents. PWB’s Strategic Plan also specifically addresses a number of strategic objectives with service level indicators. The bureau has been able to use these measures over the past four fiscal years to monitor progress toward meeting stated service levels. The FY 2011-12 update shows progress in some areas and areas for improvement in others. Thus far, PWB’s use of these specific measures is probably the best example the CSAC has found of a City bureau putting a customer service strategy into practice.

Some examples of PWB’s customer service indicators include:

- 73 percent give a “good” or “very good” rating on Auditor’s Annual Community Survey in 2012
- Respond to a customer inquiry or request within five business days
- Answer 80 percent of calls within 60 seconds
- Fewer than seven water quality complaints per 1000 customers per year
- No more than five percent of customers out of water more than three times per year
- Complete mandatory projects on schedule

Another key component of PWB’s efforts is placing emphasis on public information, outreach and involvement to improve transparency with its customers. Public outreach activities over the year included launching a new website, developing social media and the Water Blog, participating in community events, updating brochures, enhancing media relations and promoting its lead hazard and financial assistance programs. Community Involvement and Information staff also coordinated outreach activities in conjunction with specific construction projects and programs.

In 2008, PWB implemented a Water Line as a single point of contact for customers experiencing a water quality or pressure issue. The goal of this dedicated line is to help enhance the customer experience as well as reduce call volume to the main PWB Customer Service Call Center. PWB reports the program has been successful: 1,682 calls logged and 92 percent of calls resolved within one phone call to their line.

Another successful customer service innovation has been the deployment of an automated pay-by-phone system in January 2013. Many customers are using this tool which has helped decrease the PWB customer service call volume.

**Customer Feedback** – PWB invites questions and comments from the public via an online feedback template. Recently, PWB purchased an automated after-call survey system with system implementation planned for 2013. Until then, PWB continues to randomly survey its customers using a mailed questionnaire. PWB reports a response rate of about 50 percent, and the responses have been overwhelmingly positive. CSAC is interested in learning more information about PWB’s after-call system since it may be of particular interest to other bureaus with customer service call centers.

**Workforce Development** – PWB has a very extensive recruitment program that involves participation in regional job fairs, youth programs and culture events. PWB has adopted a “Customer Bill of Rights” that informs training and evaluation efforts across the bureau. In 2008, PWB hired full-time trainers however due to budget cuts, these positions were eliminated in 2012. Currently training and evaluation efforts continue under the guidance of PWB’s Customer Service Supervisor. Trainings include new employee

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orientations, customer service techniques, call quality assurance reviews, desktop coaching, technical skills, management, and emotional intelligence.

### ***Mayor Charlie Hales***

Mayor Hales took office in January 2013. Based on feedback collected during his campaign, the Mayor chose three primary areas of focus during his first six months in office: 1) Balancing the City budget, 2) Rebuilding trust in the Police Bureau, and 3) Advocating at the state level for more funds to create great public schools. Staff members are responsible for including input from a variety of constituents. For example, the Mayor attended the City Budget Forums to hear resident concerns and input. The Office includes a Constituent Relations Manager as a single point of contact for constituent concerns. Moreover, Office policy states that all staff are responsible for ensuring appropriate follow up is part of the workload related to each staff member's policy area. The Mayor is planning to set time aside monthly to talk directly with constituents out in the community about specific concerns. While the Office has not conducted any formal customer service surveys, the Office is constantly receiving constituent feedback via email, letters, Twitter and Facebook. No formal recruitment policies have been established but the Chief of Staff has shared an office policy that establishes all staff members are responsible for follow-up with constituents. The Chief of Staff has already conducted informal evaluations with each staff member. Looking forward, customer service will be incorporated into formal evaluations. Staff will also be encouraged to take advantage of trainings offered through the Bureau of Human Resources.

### ***Commissioner Nick Fish***

Commissioner Fish's staff interacts with a wide variety of constituents, across a diverse spectrum of issue areas. While there is no formal mission, values, goals statement or strategic plan, the Office reports it has developed a collaborative, well-structured system for managing constituent requests. The Office has designated staff members for receiving and tracking constituent messages pertaining to particular topics or bureaus. These include the Constituent Services Specialist that receives most incoming requests, the Constituent Relations Coordinator that handles most written inquiries, and Policy Coordinators that provide expertise in various policy areas. The Office also includes a Public Advocate dedicated to forming and nurturing bonds with constituents. The Office does not formally survey its constituents but does employ a formal tracking system including the use of spreadsheets, hard copy lists, electronic files, and emails. The Office reports all requests are tracked and handled in a timely manner. The Commissioner's staff was hired, in part, for their demonstrated ability to interact with members of the public. They are also expected to strengthen relationships with City bureau staff to help better serve constituents. The report mentions no particular training efforts or employee appraisals.

### ***Commissioner Amanda Fritz***

Commissioner Fritz's Office has incorporated specific customer service guidelines and goals into its mission and goals:

**Mission** - As public servants and advocates, we provide effective leadership by using resources wisely, promoting citizen engagement, listening to and analyzing input, and sharing information and access.

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[Note: "Cityzen" denotes a person who lives, works, pays, plays, or prays in Portland, regardless of whether they are a citizen of the United States of America eligible to vote in Portland.]

### **Constituent Service Goals for 2013-14:**

- All inquiries receive a response within 24 hours.
- Issues are resolved within seven working days, or the constituent is given a status update weekly.
- Commissioner's internal email box stays under 100 messages pending at any time, and clear by end of calendar year. External mailbox stays under 400 pending messages at any time, and clear by end of calendar year.
- Commissioner's calendar posted weekly, by Monday morning.

While there has been no customer service survey, the Office reports it uses TrackIT and TRIM to document all constituent correspondence and takes pride in being responsive. Everyone in the Office is responsible for responding to constituent concerns. Protocols have been refined recently with a new Constituent Services Specialist and new bureau assignments. Commissioner Fritz has personally answered over 5,000 emails annually. Team statistics are posted on the Commissioner's website (<http://www.portlandonline.com/fritz/index.cfm?c=49233&a=382765>) on an annual basis.

### ***Commissioner Steve Novick***

Commissioner Novick took office in January 2013 and has stated his commitment to making City government more responsive to the needs of its citizens through active engagement and outreach. The office employs a Constituent Liaison that works to integrate customer service and outreach values into office operations. The office has not yet conducted a formal customer service survey but does collect constituent feedback via letter and email. The Constituent Liaison tracks all incoming and outgoing constituent correspondence and creates regular report shared with the entire team during weekly staff meetings. Additionally, the Constituent Liaison meets weekly with each staff member assigned to specific policy areas to ensure timely follow-up with constituents. The Office plans to take advantage of customer service trainings offered through the City's Bureau of Human Resources. The Office also plans to include customer service assessments in individual staff member evaluations.

### ***Commissioner Dan Saltzman***

The CSAC report has been similar over the last several years. Commissioner Saltzman's Office does not have a specific mission statement or work plan regarding customer service. However, the Office states that it understands the directive to provide the best possible service to all constituents. The Office maintains full phone and front desk coverage during normal business hours to provide quick, courteous, and effective service. These responsibilities are spread across the entire office, with further specialization by policy area. In addition, the Office also has one full-time Public Advocate dedicated to overseeing constituent correspondence and outreach. While the Office conducts no formal customer service survey, it ensures the Commissioner reviews all constituent correspondence directed to him. Staff track responses to constituents using the TrackIT database. Moreover, staff members meet weekly with the Commissioner to discuss hot topics to make sure timely and consistent responses are provided to constituents.

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