

Meeting Date: January 6, 2015
CSAC members present: John Dutt, Ross Caron, Tina Keller, Barbra Rice
Others present: Tenzin Choephel

Topic	Discussion	Action/ Decision
Administrative update	<p>John informed committee that Tenzin will be rotating off and a new staff member will be assigned shortly.</p> <p>John proposed having committee meetings moved to an as-needed basis. Attendees said they found value in meeting periodically. John asked Tenzin to reschedule the meetings from every other month to every quarter, starting in April 2015.</p>	<p>Tenzin coordinated with Facilities Services and updated meeting recurrence in Outlook</p>
CRM/311 update	<p>Attendees discussed the status of the CRM/311 project after the Council presentation in November. BOEC remains the lead bureau for the project. John shared that BOEC submitted a 311/CRM-related proposal to the Innovation Fund but it was not accepted. John said BOEC plans to develop 311/CRM budget packages for its FY2015-16 budget proposal to Council.</p> <p>Tina shared that Lisa Turley at BOEC is meeting with Leah Treat at PBOT at the end of this month. Lisa is trying to engage Leah because of her experience with 311/CRM from prior work in Chicago and DC.</p>	
Customer service training	<p>John had to postpone the next City/County Frontline Meeting from November 2014 to January 2015. He will present his “Civics 101/History of Portland” content during the meeting and will send an invite shortly. Both Barbra and Ross said they have new staff that would benefit from the event/training. Ross asked John to present the training content to other work groups, and John said he would be willing to be available.</p>	
General updates	<p>John had a few updates for ONI:</p> <ul style="list-style-type: none"> • I&R has been receiving calls about the tree ordinance. Parks’ routing of those calls appear to be unclear and end up with the Parks reservation call center. • ONI partnered with BPS to propose a consolidated customer contact list/database project to be funded through the Innovation Grant. The proposal was a finalist but was not ultimately selected for funding. <p>Tina had a few updates for PBOT:</p> <ul style="list-style-type: none"> • Regulatory Division previously at Revenue has been moved to PBOT (http://www.portlandoregon.gov/transportation/?c=38405&a=296082). Plans are in 	

process to move these six to seven staff members from Revenue's Columbia location to the 14th floor of the Portland Building. The division will have its own front desk, and customers can pay any necessary payments at the 1st floor through Parks.

- PBOT's 8th floor reception area will be remodeled. It will result in improved access for customers with disabilities.
- PBOT's phone system is being changed
- RFP for the Customer Service Intake Review has been closed and Jenny Carmichael has been awarded the contract. Tina is currently negotiating the contract terms, and making preparations for the contractor's start of the project in March 2015.
- PBOT is experiencing a number of retirements of senior staff members. Greg Jones, Deputy Director; Rob Burchfield, System Management; Marni Glick, Parking Operations; and Nolan Mackrill, Parking Operations. Tina said that, based on a past review, about 40 percent of PBOT staff will be eligible for retirement over the next five years.

Barbra had a few updates for Revenue:

- Revenue Bureau went through a reorganization within OMF and is now a division under the new Bureau of Revenue and Financial Services (BRFS). Tenzin added that Procurement Services has also been moved to this new bureau (from Bureau of Internal Business Services (BIBS)). The new OMF organizational chart can be found at <http://www.portlandoregon.gov/omf/25949?a=285579>.
- Leaf fee processing is almost complete and went more smoothly this year than past years (started in November 2010).
- Arts tax collections for 2014 can now be filed online
- IRS data share project is currently in process. Revenue has taken the necessary IT security measures, and currently reviewing restrictions on how this data can be accessed and used by the City
- Carrie Lathers, formerly on CSAC, has retired and Sarah Meadows has taken her position as trainer for Revenue

Ross had a few updates for BDS:

- Consultant has completed customer and community/resident survey for BDS. Ross said this is the first survey BDS has done since 2007/2008. It was also administered online for the first time. The customer survey results (about 750 completed surveys) show that respondents were fairly satisfied with their experience, but satisfaction decreased when service complexity increased. Other takeaways: need for more timely service, as well as applicant online access to permitting process. BDS attempted its first survey of community members / residents (about 100 completed surveys) by reaching out to organizations (like neighborhood associations) as well as individuals. In the future, Ross said BDS would like to better capture feedback from renters and information about enforcement programs.

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- ACD priority groups have now gone live in the AVAYA phone system.
 - Customer Support Program covers the front desk/reception area as well as answers calls from the bureau's main phone line (823-7300). There are three Office Support Staff (OSS) positions for this program, and Ross said he needs another to ensure coverage.
 - BDS has phone lines for each of its 15 departments and the bureau is making an effort to phase out these lines given the number of misrouted calls and cumbersome voicemail retrieval. There is a current pilot process for three departments to have their voicemail messages retrieved by the front desk and entered into TrackIT for further routing.

There was a general discussion about challenges with staff meetings for customer service positions. Some bureaus are unable to hold staff meetings; others convene staff meetings but not everyone can attend due to coverage needs at desk or via phone.

Next meeting The next committee meeting is Tuesday, April 7th from 1:30-2:30pm.
