

**Customer Surveying Guidance for City Bureaus  
provided by  
Citywide Customer Service Advisory Committee**

The City of Portland Customer Service Advisory Committee (CSAC) was created by City Council in September 2006 to assist all City bureaus in working collaboratively with their employees to improve customer service. Creation of the committee was one of the primary recommendations of the Mayor's Bureau Innovation Project #7. All of BIP #7's recommendations were adopted unanimously by City Council. The CSAC is a resource to assist bureaus in their customer service efforts.

One of the other key recommendations of BIP #7 was that all bureaus should conduct customer service surveys of their customers at least every 2 years. Included in this recommendation was a standard survey measurement tool based in large part on the work done by a State of Oregon Customer Satisfaction Work Group. The CSAC endorses this as a common customer satisfaction performance measure and will work with all bureaus to incorporate this into their regular surveying of customers.

What follows is some basic information on developing or modifying surveys to incorporate this standard performance measure.

- Each bureau will conduct a customer service survey of its key customers at least biennially that, at a minimum, adheres to these guidelines.
- The questions that need to be asked consistently across bureaus can be found in Table 1. They cover six topics: **1. Timeliness; 2. Accuracy; 3. Helpfulness; 4. Expertise; 5. Availability of Information; and 6. Overall Service.**
- Surveys can contain additional questions but surveys must contain these questions to assess the key drivers of good customer service across the city.
- The required questions should employ a four-point rating scale: Excellent, Good, Fair, Poor, and Don't Know.

**Table 1 – Required Questions**

Instruction: *Please answer the following questions regarding your rating of service provided by (insert bureau or department)*

Scale:

Excellent                  Good                  Fair                  Poor                  Don't Know\*

Questions:

**TIMELINESS**

1. How do you rate the timeliness of the services provided by (insert bureau/dept)?

**ACCURACY**

2. How do you rate the ability of (insert bureau/dept) to provide services correctly the first time?

**HELPFULNESS**

3. How do you rate the helpfulness of (insert bureau/dept) employees?

**EXPERTISE**

4. How do you rate the knowledge and expertise of (insert bureau/dept) employees?

**AVAILABILITY OF INFORMATION**

5. How do you rate the availability of information at (insert bureau/dept)?

**OVERALL SERVICE**

6. How do you rate the overall quality of service provided by (insert bureau/dept)?

*\* Survey respondents lacking sufficient knowledge to answer a particular question may opt out of that question by answering "Don't Know"*

Agencies should describe important survey characteristics when reporting results.

1. Surveyor- Who conducted the survey? Staff, consultant, volunteers, interns, board/commission members?
2. Date Conducted- Identify the period over which the survey was conducted.
3. Population- Defining "customer" can be challenging in the public sector. For our purposes we are using the following "type" definitions:
  - a. Complier- individuals or entities on the receiving end of enforcement activity.
  - b. Consumers- end user of agency programs, services, or information.
  - c. Constituents- individuals or entities who have vested interest in the bureau's work.
  - d. Clients- individuals or entities that fund the service/program (grantors or legislators for example).
4. Sampling Frame- Records from which a sample will be drawn. (EX- customers who have had a recent interaction with the bureau)
5. Sampling Procedure- A random sample from the population provides the highest level of validity. (Type of sample, method for drawing the sample, sample size.)

6. Sample Characteristics- The larger the sample, the more likely the results will validly represent the population.

Report should include:

1. The population (total number of people being characterized)
2. Sample size (number of individuals contacted)
3. Number of respondents
4. Response rate

### **Communicating Results**

The results of the customer service surveys should be included in each agency's budget reports using the Customer Service Improvement Status Report form. (See Attached) Information should include the results of the six required customer service questions as well as the above mentioned survey characteristics.