

Meeting Date: May 10, 2012

CSAC members present: John Dutt, Alisa Cour, Myndi Fertal, George Hocker, Carrie Lathers, Carrie Popenuk, Margie Sollinger

Others present: Gale Baird, Tenzin Choephel

Topic	Discussion	Action/ Decision
Welcome new CSAC members	<p>John welcomed Myndi Fertal, Carrie Popenuk, and Margie Sollinger as new additions to CSAC. Myndi replaces Art Alexander who is retiring at the end of June; Carrie replaces LeAnne Tumbaga; and Margie replaces Michael Mills, the former Ombudsperson. He also welcomed Tenzin Choephel as the new staff person assigned to CSAC, replacing Jennifer Scott.</p> <p>John will schedule a time to meet with Myndi and Carrie to orient them to the committee. He has already met with Margie.</p>	<p>John to orient Myndi and Carrie at a later date.</p>
Discussion with Gale Baird	<p>Gale serves as the Bureau of Human Resources' Training and Development Manager. She presented information about current initiatives related to Citywide training.</p> <p>She informed CSAC that BHR is currently blueprinting to a new SAP module that will replace Pathlore – the current system used for online scheduling of City training offerings – by the time the City's contract with Pathlore ends in January 2013. After this migration of BHR's existing functionality, it plans to expand to e-learning and virtual training offerings that will be assignable to employees (by position or classification) and accessible through the City's Employee Portal and Citylink webpages. BHR is currently identifying bureau liaisons for this work.</p> <p>Gale also informed CSAC that BHR is identifying people from bureaus to develop best practices and core competencies in various areas, one of which would be customer service. She said some of this training may be offered online but, at a certain point, classroom or other settings will be needed for skill development. There are two options for training: the first would be to develop in-house training which takes City resources but then are usually free for registrants thereafter; the second would be to use a resource like Portland Community College (PCC) to develop training offerings where registrants would be charged at reasonable costs. BHR sees value in the latter given that there are limited resources (few training funds and three BHR training staff) and PCC often identifies and evaluates instructors.</p> <p>Gale stated BHR may be designing a customer service training needs survey to elicit feedback and report results.</p>	

	Gale stated CSAC may have specialized expertise and contacts that may be helpful in these initiatives. John will maintain contact with Gale to explore and discuss further.	John to follow-up with Gale
Budget reports	<p>John provided a synopsis of the customer service status reports thus far received through the bureau's budget submittals. He identified four areas for follow-up:</p> <p>Reports were missing for Revenue, Bureau of Technology Services (BTS) and BHR. He stated the Office of Management and Finance (OMF) report referenced some work in these bureaus but, in past years, these bureaus also provide additional reports. John said that BHR responded that, given it was late in 2011 submission, there was no update needed. Myndi and Carrie will follow-up with their respective bureaus, BTS and Revenue, respectively.</p> <p>Reports were also missing for the offices of elected officials.</p> <p>Report was missing for the new bureau, the Office of Equity. Dante James is the new director and John sent him an email about the budget reporting responsibilities. Since Dante has just recently started, John will follow-up with him at a later date.</p> <p>Reports seemed to be incomplete or lacking for a few bureaus – the Portland Development Commission (PDC), Police, Portland Bureau of Emergency Management (PBEM) and Bureau of Planning and Sustainability (BPS). Myndi has a contact at PDC. Alisa has contacts with the Police Public Information Officers. John has contacts with PBEM and suggested asking Ross or Colleen at the Bureau of Development Services (BDS) to contact BPS since they are in the same building.</p> <p>John requested that the CSAC Site Teams be used for outreach and follow-up unless otherwise assigned. For the new members, he briefly explained the Site Teams organization and purpose, and read off assignments. He asked if attendees remembered seeing an email from Jennifer Scott with the budget reports. Since there were no responses, John asked Tenzin to forward each Site Team their budget areas.</p>	<p>Myndi to follow-up with BTS Carrie to follow-up with Revenue</p> <p>John will follow up with the electeds offices</p> <p>John to follow-up with Office of Equity</p> <p>Myndi to follow-up with PDC Alisa to follow-up with Police John to follow-up with PBEM Ross/Colleen to follow-up with BPS</p> <p>Tenzin to email Site Teams with budget reports</p>
CRM/311 update	<p>Since there were few attendees at the April meeting, John repeated his report about the CRM/311 project. The project is referred to by the system acronyms (Customer Relationship Manager (CRM), Customer Management System (CMS)) or the phone number (311). John reported that Tim Crail in Commissioner Fritz's Office organized the first "311" meeting a few months ago. Other CSAC members (Carrie Lathers, Myndi and Alisa) were also in attendance and there were 12-15 people total but noted no representatives from a few key bureaus (i.e. PBOT and BDS). Lisa Turley from BOEC presented technical aspects of any future system. There was an overview of what other cities have done in this area, and John stated there were about 70 cities nationwide with a CRM system. John explained</p>	

that Commissioner Fritz's Office hopes to have something appropriated in the FY 2013-14 budget, but there has been no further action or communication since the meeting.

General updates

John shared that he met with Ali Ryan at Parks about participating on CSAC. Parks has provided in-house customer service training, and has not previously been represented on CSAC. Ali has requested her supervisor to approve her participation

John proposed that CSAC meets every other month instead of every month. Attendees agreed with that decision.

John will follow up with Ali and make an official invitation to join.