

**Meeting Date:** March 4, 2014

**CSAC members present:** John Dutt, Ross Caron, Tina Keller, Carrie Popenuk, Barbra Rice, Kim Sneath, Vincent Woods

**Others present:** Tenzin Choephel

Topic	Discussion	Action/ Decision
Customer service budget reports	<p>John shared that the City Council presentation will be on Thursday, March 12<sup>th</sup> at 9:30am (time certain). He has recruited Carrie Popenuk and Tina Keller to help present on behalf of CSAC. John anticipates the presentation to follow the Executive Summary format. John, Carrie and Tina convened after the CSAC meeting to discuss preparations for the Council session.</p> <p>Tenzin distributed available hardcopies of the full CSAC report to attendees (electronic copy sent via email on February 27<sup>th</sup> and also available on the CSAC website at <a href="http://www.portlandoregon.gov/oni/article/482627">http://www.portlandoregon.gov/oni/article/482627</a>).</p> <p>Ross and Carrie asked if this was the final draft of the report. John indicated it was because of the Council submission deadlines. Tenzin added that much of the content has remained the same; John said there were most recent updates to FPDR and Police due to feedback after the Bureau Directors meeting in December. Vincent asked if this information has been distributed and John said it will be in Council's possession. Tina asked about the report period. John said it is based on budget submissions that describe the prior year so there is a reporting delay that is consistent with prior CSAC reports.</p> <p>John referred to the Executive Summary which identifies the stagnation trend due to budget cuts. A few bureaus – PWB and Parks – have been able to sustain efforts despite these budget challenges. Since the reporting period, bureaus have begun to restore prior efforts and he described BDS as a noteworthy example. John said he invited Tina to describe PBOT efforts because this is an example of a new initiative and later described how the challenges at PBOT reflect a microcosm of the challenges faced Citywide.</p>	
CRM/311 update	<p>John asked Ross to provide an update since he is on the Selection Committee. Ross said that the committee is meeting for the second time on March 31<sup>st</sup>. At that time, the top proposers will be presenting via WebEx. After, the committee will submit final scores.</p> <p>Tina asked about a timeframe. Ross reminded the group that the scope of this contract is for the assessment and business case, not implementation of a system [Admin Note: see eBid Solicitation BOEC008]. Ross said he recalled there was an aggressive implementation timeframe, possibly even by the end of this fiscal year.</p>	

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Customer service training John said he emailed some CSAC members to update his City/County contact list for front-line staff. John manages the Information & Referral (I&R) program and hopes to host regular convenings of front-line staff in the near future for training as well as networking. John is working with Brad Taylor within ONI to offer a mental health-related training for the first convening. John recognizes that, given coverage requirements, not all staff will be available to attend but hopes that bureaus will rotate the opportunity across their customer service team.

At the end of the meeting, Tenzin shared that the Independent Police Review recently hosted a “Transgender 101” training for the Auditor’s Office. The training was provided by Basic Rights Oregon. Tenzin will share more details with CSAC about the training and any evaluation feedback after it has been compiled.

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General updates Barbra shared that the Revenue Bureau is about to send Arts Tax postcards soon. She said that taxpayers may have inadvertently paid their \$35 tax to other City bureaus. For example, by using electronic billpay addressed to their utility bill account. She asked that other City bureaus contact her in case they receive the \$35 Arts Tax. Likewise, she will contact other bureaus in case ratepayers accidentally send their utility bill payments to the Revenue Bureau’s attention. Barbra said the bureau also sent 2012 tax collection notices and has begun non-filer efforts.

A number of CSAC members have experienced turnover in their customer service teams. There was a discussion about position classifications, salary ranges (<http://www.portlandoregon.gov/bhr/article/401294>) and the differences across bureaus. With the exception of the City Attorney’s Office, these are DCTU represented employees. CSAC members said that employees rarely bid into these call center positions. A list of specific classifications discussed included:

- Revenue Tax Specialist series (Revenue) - <http://www.portlandoregon.gov/bhr/article/26849>. Barbra shared they are currently recruiting ([March 14<sup>th</sup> deadline](#)) and plan to hire about five positions from this pool of candidates. Barbra shared that the Revenue Bureau conducts a short “speed” interview (15 minutes in length) for the first round of candidates and then a longer interview for the second round. Barbra said they distribute an Information Sheet to the first round interviewees that address commonly asked questions.
- Customer Account Specialist series (PWB) - <http://www.portlandoregon.gov/bhr/article/13690>. Carrie said she needs to hire two Customer Account Specialist 1 positions soon.
- Information and Referral Specialist (ONI) - <http://www.portlandoregon.gov/bhr/article/47781>. John said this classification is specific to ONI but has the same pay as the OSS (see below) but with a job description that is more focused on phone calls.

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- Office Support Specialist series (e.g. BDS, Attorney) – BDS ties to rotate staff within this classification between back and front office functions whenever possible.  
<http://www.portlandoregon.gov/bhr/article/13689>.

Tina said she has filled all of her team's positions and has now begun reviews of internal processes as well as methods external customers use to reach PBOT.

Vincent said BHR has been working with the City Attorney's Office on the implementation of the new Oregon law (effective January 2014) on recruiting veterans. Vincent shared that the veteran candidate preference is throughout the recruitment process. Unlike other populations, veterans can request documentation on why they were not selected. BHR is working on how to balance these preferences with other outreach efforts (e.g. women, minorities).

Carrie had a couple of different items to share:

- Winter water usage is used as the basis for the sewer rates. Usually, the bill period is about 90 days but, due to inclement weather and power outages, the bill period was 103 days. As a result, more customers have been called to ask about their bill – PWB has been managing a larger workload (1,200 calls yesterday with an average hold time of five minutes) due to the winter billing.
- Under Commissioner Fish, the bureau is refocused – all hardcopy documents refer to “sewer, stormwater and water” to reflect the significance of each utility's portion of the overall billing statement.
- Training group within the bureau has been dissolved and there are no plans to re-establish in the future.

Kim also shared a number of items:

- Tracy Reeve is the new City Attorney.
- The Office has submitted a budget add package for a new position that would be focused on public records, specifically Citywide policies and Citywide training.
- As Kim shared last meeting, the Office is hoping to use a software portal (see Gov Q&A link <http://govqa.com/oursolutions/foia-and-open-records-management/>) to centralize all public records requests and cost estimates for the City. She mentioned that [Forth Worth, TX](#), and [Olympia, WA](#), are two cities that have already implemented a similar portal.

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Next meeting

The next committee meeting is Tuesday, May 6<sup>th</sup> from 1:30-2:30pm.