

Meeting Date: November 4, 2014

CSAC members present: John Dutt, Barbra Rice, Kim Sneath

Others present: Tenzin Choephel

Topic	Discussion	Action/ Decision
CRM/311 update	<p>Barbra and Kim said potential interviewees from their bureaus were not contacted by the consultants. John said he did follow up about Revenue Bureau after the last CSAC meeting.</p> <p>John shared Stern Consulting completed its work and will be presenting to Council next week – Wednesday, November 12th at 10:15am (see “Upcoming Council Agenda Items” available online http://www.portlandonline.com/auditor/index.cfm?c=26997&a=378315).</p> <p>The Steering Committee met two weeks ago to provide feedback on the draft assessment and recommendations. John provided a brief overview of the draft content: consultants are recommending a CRM system for the City; cloud-based IT solution (e.g. database estimated at \$1 million for initial three years) that incorporates legacy systems; centralized call center either set up as a separate bureau (like City Budget Office) or within ONI or BOEC; and pilot implementation with bureaus that are in need of a solution or interested in the potential of CRM (i.e. BES, Fire, ONI PBOT, Police non-Emergency line (currently managed by BOEC)). John said that BDS is interested but not able to participate in the pilot, Parks is less interested, and PWB is not interested. Barbra said Revenue is also not interested.</p>	<p>John encouraged CSAC members to listen to the City Council session.</p>
Customer service training	<p>John hopes to schedule the next City/County Frontline Meeting for either Tuesday November 18th or 25th. He will present his “Civics 101/History of Portland” content during the meeting.</p> <p>Tenzin added that Brad Taylor recently presented his “Managing Stressful Situations While Working with the Public” training to the Auditor’s Office.</p>	
General updates	<p>John had a few updates for ONI:</p> <ul style="list-style-type: none"> • Information and Referral (I&R) is celebrating its 20th anniversary this month. November 16th also happens to be National Information and Referral Services Day. ONI I&R will be holding a celebration on Friday, November 14th to commemorate the occasion. John said an email will be distributed soon. • John has been participating in BTS’ IT strategic planning process as well as Parks’ inclusivity initiative. <p>Barbra had a few updates for Revenue:</p>	

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- The team is in the middle of leaf season, and November 1st was the opt-out deadline.
 - All but two staff are new employees. Therefore, training needs have been high.
 - Cayenta address information is being used for data matches against potential Arts tax non-filers. About 1,000 letters will be mailed out each week between now and tax season, with penalties for late filers waived. Voter registration and DMV records have been used to identify individual and business non-filers in the past.
 - PBOT's street fee/tax proposal will include collections by Revenue. Based on past proposals, this could increase Revenue staff by 20 FTE. Individuals would be identified in a manner similar to Arts Tax; businesses would be identified using the business tax registry.

Kim said some of the Attorney's Office is now located on the 1st Floor in the City Treasurer's old space. There have been increased staff: three new attorneys, as well as individuals who are new lawyers that are serving in an unpaid fellowship program. Kim said that support staff positions have not increased.

Tina had a meeting conflict but sent information via email about the PBOT Customer Intake Review RFP. She's currently conducting reference checks, and PBOT plans to interview the shortlisted firms. PBOT hopes to have the selected contractor start work in early 2015.

Tenzin shared that the City Auditor's Office welcomed City Auditor-elect Mary Hull Caballero today. Mary has introductory meetings scheduled with City Council members, Bureau directors and City Auditor's Office staff members between now and when she officially starts office on January 1st.

Next meeting

The next committee meeting is Tuesday, January 6th from 1:30-2:30pm.
