

Bureau Innovation Project (BIP) Template Implementation, Evaluation, and Fiscal Impact Plan

This BIP template is to be completed by each BIP team making a recommendation and the team's OMF analyst. Completed templates are due to the Mayor's Office 15 working days before the Implementation meeting at which the recommendation is to be heard. This template will be shared with all BIP stakeholders for feedback, which BIP teams are required to incorporate into their final recommendations.

BIP Team Information:

BIP Team # 7 Customer Service

Direct all City bureaus to work collaboratively with their employees and with each other to develop improved Customer Service policies and procedures.

Recommendations & Benefits/Rationale:

Please list the team's recommendations and corresponding benefits/rationale. Add rows to this table as needed.

Recommendation		Benefits/rationale	
1	<p>Team #7's Recommendations for all City Bureaus/Offices</p> <p><u>Overarching Goals</u></p> <ol style="list-style-type: none"> 1. City adopts City of Portland Customer Bill of Rights and Staff Workplace Aspirations. (Attached) 2. Support a customer service culture by required explicit goals and values embedded within each bureau/office's mission for both internal and external customers. 3. Develop a City wide program to recognize City staff who exemplify the City's customer service goals and values. 4. Establish a Customer Service Advisory Committee to monitor, assess and recommend continuous customer service improvements to ensure consistency throughout the City. 	1	<ol style="list-style-type: none"> 1. Customer service goals and values are adopted City-wide. 2. Customer service goal and values must be given a visible place of importance for both City staff and the public to see. 3. Recognition supports the creation of a customer service culture. 4. An advisory committee will ensure consistent, predictable, high quality customer service across all City agencies.

	<p><u>Assessment Goals</u></p> <ol style="list-style-type: none"> 1. Identify key customer group values and behaviors to best provide the services that meet the needs. 2. Conduct customer service surveys to assess timeliness, accuracy, helpfulness, expertise and availability of information. Work toward biennial statistically valid surveys where appropriate. 3. Establish customer service evaluation programs using tools such as anonymous shoppers and customer service focus groups for both internal and external customers. <p><u>Employee Goals</u></p> <ol style="list-style-type: none"> 1. Expand customer service training opportunities for all employees. 2. Empower employees to resolve complaints and increase responsibility and accountability. 3. Emphasize customer service criteria in job descriptions, recruitment efforts, and employee evaluations. 		<ol style="list-style-type: none"> 1. Customer service must be tailored to the needs of those receiving it. 2. Customer service measurement tool to guide action plan. 3. Customer service measurement tools to guide action plan. <ol style="list-style-type: none"> 1. All employees must have the tools to meet the customer service objectives. 2. Provide quick, fair and effective resolution to customer concerns in accordance with program objectives. 3. To develop a workforce with high customer service skills.
2	<p>Team #7's Recommendations for Specific Bureaus</p> <ol style="list-style-type: none"> 1. <u>Human Resources</u> Develop customer service elements for job descriptions, job recruitments and performance evaluations. Develop generic customer service training materials and coordinate customer service training. 2. <u>Auditor's Office</u> Evaluate the possibility of adding questions to the Annual SEA Survey to help measure customer service satisfaction across the City. 	2	<ol style="list-style-type: none"> 1. To develop a workforce with high customer service skills. 2. This would complement the surveys done by individual bureaus and give a city-wide evaluation of customer service. However, the Auditor points out that the SEA Survey is not designed in a way that can accommodate additional open questions. Requires further review with the CS Advisory Committee.

<p>3. BTS: Support the Customer Service Advisory Committee by the Development of a “PortlandOnline” sub-site as a customer service forum.</p>	<p>3. Provides for quick, easy citizen-initiated evaluation.</p>
--	--

Council Actions:

List Council action(s) needed:

Report Resolution Ordinance Budget approval (Starting 06/07)
 Requested Date of Action: _Spring 06_____

Fiscal Impacts:

Can implementation be accomplished within existing resources?

Yes No It Depends

If “No”: explain why it can’t be.

If “Yes”: detail any impacts of absorbing costs within existing appropriations.

If “It depends”: If implementation will impact multiple bureaus and if the fiscal impacts will vary across those bureaus, explain the multiple impacts, noting where implementation could or could not be accomplished within existing resources (to the extent known).

Resources Needed:

Description (who needs what)	Budget Amount	Fiscal Year Needed	One Time? Ongoing?
<p>Some bureaus may already have existing funded programs that address these recommendations; other bureaus will need to seek funding for the appropriate resource requirements.</p>	<p>Training-TBD, probably at least \$50,000 one-time</p> <p>Surveys-TBD for bureaus not currently collecting information</p>	<p>FY 06-07/07-08</p> <p>FY 06-07/07-08</p>	<p>One-time with possible later one-time costs for new hires or ongoing staff cost for train the trainer</p> <p>Ongoing</p>
<p>Staff support (25% Management Analyst—proposed to be housed in Auditor’s Office and currently included in Mayor’s Proposed budget)</p>	<p>\$20,770 estimate</p>	<p>FY 06-07</p>	<p>Ongoing</p>
<p>PortlandOnline sub-site development</p>	<p>\$400-2,900</p>	<p>FY 06-07 (request in BuMP when site requirements specified)</p>	<p>One-time</p>

Other potential resources available:

Note any partnership, grant or shared resources that may be available or to be pursued

Financial Analyst Notes:

This section is to be completed by an OMF Financial Planning analyst, if resources are requested. In this section, please address the following:

- Financial Planning analysis, including Return on Investment, if applicable.
- Funding requests that are/aren't recommended, and why.

ROI is inapplicable here: no tangible savings are expected for this investment.

Overall, the cost for these recommendations cannot be accurately estimated until:

- bureaus complete their customer service assessments,
- training and web site development requirements are further defined, and
- the office where the position is to be added is identified.

This information should be available in fall 2006 if the recommended timeline is followed, but the position could be included in the FY 2006-07 budget if the office is identified before adoption in June.

Training costs are difficult to estimate: BHR estimates \$50,000 to develop an 8-hour training module; staff time to deliver Citywide training on a "train the trainer" basis would be considerable. BHR also recommends that training be customized or at least targeted for bureaus' specific needs, which argues against generic, Citywide training. Based on customer service training experiences in BDS and OMF and the cost of a course offered through PCC, a reasonable estimate for targeted training delivery cost may be \$10 per trainee hour. (BDS had 12 hours of training for staff and 24 hours for management. OMF is having 4 hours of training, plus 4 hours for train the trainers.) Assuming that bureaus that have already invested in customer service training will not need additional training, other bureaus will have to estimate the number of people to be trained, and the advisory committee and BHR will need to reach consensus on minimum training standards to determine the length of training needed. A Citywide estimate will not be available until bureaus complete their customer service assessments.

Customer survey costs will have to be developed by each bureau that is not currently surveying customers as required by this recommendation. A Citywide estimate will not be available until bureaus complete their customer service assessments.

The staff support cost estimate is based on 25% of a full-time Management Analyst. The actual cost cannot be determined without knowing the office to which the position will be assigned and whether the office has the ability to increase an existing part-time position. If not, adding a new half-time position would cost roughly twice the amount noted above.

The PortlandOnline sub-site development cost cannot be accurately estimated without defining its specifications. If it uses existing capabilities, the cost is nil or nearly so. If the advisory committee defines requirements that have to be developed, then that cost can be requested in a BuMP by the office where the staff support is assigned.

Financial Analyst: Nancy Hartline

Analyst Signature: _____

Date: _____

Implementation Partners:

Rec. #	Lead Who in which bureau(s) will lead the implementation, integrate the project in bureau work plan(s), and report on progress?	Other Partners other partners who will be involved throughout implementation
1	All City agencies	Customer Service Advisory Committee
2	Bureau of Human Resources, Auditor, Bureau of Technology Services	Customer Service Advisory Committee

Overall Timeline:

How long will implementation take? If the work will be ongoing, explain when it will be fully integrated into business processes or plans (i.e., when will it become just how we do business?).

Implementation should begin immediately and be fully integrated by July 1, 2008 pending budget approval.

Implementation & Transition Plan:

List actions to be undertaken over next 12-18 months, including how stakeholders will be kept apprised or involved through implementation. Complete a table for each proposed team recommendation.

Recommendation #1		
Action Item	Projected Completion Date	Responsible Party
Implementation Team gives approval to move forward with recommendations	5/4/06	Team
A tentative decision has been made to have the committee report to Audit Services. It has yet to be determined <i>who</i> will appoint the committee.	7/1/06	A transitional sub-committee made of BIP 7 members would work with Audit Services to ensure a smooth transition.
Advisory Committee will create a template for bureaus to use to conduct their customer services assessments.	9/15/06	Committee
Each bureau determines costs for conducting customer service surveys and develops an initial assessment outline for a customer service strategy, and identifies first phase fiscal requirements by the winter BuMP '07.	1/15/07	All bureaus
Each bureau completes their assessment, develops a customer service improvement strategy.	6/15/07	All bureaus

Recommendation #2		
Action Item	Projected Completion Date	Responsible Party
Develop standard customer services KSAs and integrate them into the specs of at least the 6 most intensive customer service related job classes and add them to any newly created job classifications.	1/1/07	BHR
Create standard language to address customer service competency for bureaus to use when doing employee evaluations.	1/1/07	BHR
Design an ongoing training program to meet City wide customer service objectives.	Winter BuMP '07	BHR

Work with the Customer Service Advisory Committee to design the specifications for a customer service site on PortlandOnLine.	1/1/07	BTS
Evaluate and Identify customer service satisfaction questions that may be added to the SEA Survey	Requires Feasibility review w/ Audit Services	Auditor / Audit Services

Implementation Team Concerns:

Source/ Date of Concern	Concern raised	How concern was addressed
Implementation Team/April 6	<p>In response to question raised regarding the Fiscal Impacts of Customer Service Surveys.</p> <p>BIP #7 received responses from the majority of bureaus regarding the costs estimated for their customer surveys. While we do not consider this complete information, we think it provides BIP Leadership and Council with enough information to make an informed decision regarding our recommendations, including the recommendation that bureaus conduct customer surveys.</p> <p>As one might expect, the costs associated for conducting surveys varied greatly depending on the type of surveys and the level of statistical accuracy desired. Many City agencies do not conduct customer service surveys. Some bureaus have managed to conduct surveys with existing staff, or staff assisted by BTS. In addition to staff resources, costs range from several thousand dollars for purchasing a sample population mailing list, to an estimated \$35,000 (PPB) for a statistically valid survey used in the development of a bureau strategic plan. PDOT undertakes a number of surveys, some to gather input on pedestrian and transportation planning, and others to evaluate existing services. Costs for these surveys range from modest printing and several days of staff time, up to \$140,000 for an in-depth, controlled and statistically valid survey of 3,000 households related to the "TravelSmart" campaign.</p>	<p>The development of survey approaches and methodology will be prepared by the new position (1/4 FTE) in concert with the Customer Service Advisory Committee. This assistance will aid bureaus in selecting appropriate tools to conduct their assessments and develop their customer service plans.</p>

	<p>Tom Feely, of OMF's Business Operations, provided one of the most comprehensive responses. The response is particularly useful in that it provides a range of different surveying methodologies that achieve results for a variety of purposes. Their use of surveys can be viewed as a microcosm of what the Customer Service Surveys across all City agencies could look like and helps serve as a guide for estimating costs. Of OMF agencies, some do not now conduct surveys, another conducts a basic uncontrolled survey with existing staff, and while several others utilize the expertise of consultants ranging in cost from \$19,000 to an estimated \$35,000. Costs can be higher, up to an estimated \$90,000, if the contracts include related training and strategic planning.</p> <p>What we see is that there are a number of City agencies now conducting a variety of surveys with a wide range of costs. We also find that that there are significant resources committed to conducting these surveys, either through existing staff or under contract with consultants. Our recommendation for all agencies to conduct customer service surveys is intended to institutionalize the practice of listening to the public we serve. This is now a practice among many agencies, but is not the norm. This recommendation is intended to support and provide additional tools for those already conducting surveys, and to provide useful guidelines for those who have yet to do so. We realize that for some this change may require additional resources and may be a gradual process; however, the intent is to eventually reach a high level of proficiency in the area of understanding our customers uniformly among all City agencies.</p>	
--	--	--

Evaluation Plan:

Through the life of the project, bureau(s)/individuals responsible for implementation are to assess the success of the project. These entities will report on progress to Council annually in the fall reporting process integrated with performance/Managing for Results. All new resource requests will be incorporated into budget processes (including budget monitoring) for Council approval. For each team recommendation, please complete the table below.

Recommendation #1:
How will the team/City know when the effort is completed and whether or not it was successful? Improvement will be shown through the use of measurement tools. However, customer needs are continuously evolving, so customer service improvement efforts are never completed.
What major measure(s) will you use to assess the progress of the recommendation? (indicators should be a mix of workload and effectiveness measures, when possible) Individual Bureau, SEA and PortlandOnline survey results.
How will this information be tracked/recorded, and by whom? The Customer Service Advisory Committee supported by 25% FTE Management Analyst and through annual reports to Council.
Recommendation #2:
How will the team/City know when the effort is completed and whether or not it was successful? When all job classifications contain customer service KSAs, customer service competency is a part of all employee evaluations, customer service training is available for all employees and required for most. Success will be measured by bureau surveys and the SEA demonstrating increased customer satisfaction.
What major measure(s) will you use to assess the progress of the recommendation? (indicators should be a mix of workload and effectiveness measures, when possible) Bureau surveys and the SEA
How will this information be tracked/recorded, and by whom? The Customer Service Advisory Committee supported by 25% FTE Management Analyst and through annual reports to Council.

Co-leads' Signature:

Name: <insert name> Signature: _____ Date: _____

Name: <insert name> Signature: _____ Date: _____

Name: <insert name> Signature: _____ Date: _____

City of Portland Customer Expectations

Customers of the City of Portland, can expect:

1. Courteous and respectful treatment at all times.
2. To be listened to and heard by staff.
3. Timely service when seeking assistance by phone, e-mail, in person or any other means of communication.
4. Services to be accessible during reasonable business hours.
5. Reliable, complete, and up-to-date information from knowledgeable, competent and cooperative staff.
6. Appropriate explanations as to the extents and limits of the services provided.
7. Processes that are openly and clearly articulated, and that are predictable, logical, streamlined, fair and legal.
8. Actions, which are both fair and ethical.
9. A commitment to the continuous improvement of services, processes, and programs and that comments and suggestions are encouraged from us to facilitate this endeavor.
10. Personalize, solution-oriented communications, which offer options to resolving issues.
11. Support in solving problems we may encounter with City processes.
12. An adequate level of staff that is cross-trained during all business hours to meet our needs.
13. Clearly defined avenues for resolving disputes or service delivery issues.

Staff Workplace Aspirations Needed To Achieve Customer Service Excellence

As employees of the City of Portland, we:

1. Act with integrity and are treated with respect;
2. Cooperate with and support one another;
3. Share ideas and experiences that enhance our work performance;
4. Support a work environment where both suggestions and constructive criticism are respected;
5. Give and receive appropriate acknowledgment for our efforts;
6. Understand the nature of each other's work;
7. Strive toward more effective communication with co-workers and the public;
8. Need the appropriate tools and training necessary for enhanced job performance;
9. Need a reasonable work load;
10. Need realistic time frames in which to accomplish our work.