

Meeting Date:**November 20, 2006****CSAC members present:**

Art Alexander	Michael Kaplan	Bonnie Morris
Alisa Cour	Kathleen Lynch	Jeremy Van Keuren
Michael Dehner	Michael Mills	Vincent Woods
John Dutt	Michael Mock	

Others present:

Mayor Tom Potter and Kyle Chisek (for about 20 minutes)
Beth Woodward, CSAC Coordinator

Notes prepared by: Beth Woodward**Date prepared:** November 28, 2006**CSAC approved:** December 11, 2006

Agenda

Beth Woodward asked for any changes to the agenda. The item on Mayor's perspective on employee recognition was postponed to a future meeting, and the discussion of meeting times was moved up.

Introductions

Everyone introduced themselves, since this was the first meeting. Michael Kaplan is one of two CSAC members who are not City employees. He is currently Ombudsman for PacifiCorp and has experience in strategic planning and organizational planning for nonprofits. Michael Dehner represents Laborers' International Union of North American (LIUNA) Local 483.

Woodward told the Committee that as Coordinator she is a neutral facilitator and resource for CSAC, in a position located in the Auditor's Office and supported in part by the Mayor's Office for this function. She is not a CSAC member.

BIP # 7

Recommendations

Michael Mills and Bonnie Morris, who previously co-chaired the customer service Bureau Innovation Project (BIP # 7) with Carol Stahlke, described the BIP's process and recommendations. Mills explained that significant work by the BIP went into creating the "City of Portland Customer Expectations." He said that this CSAC Committee is a direct outcome of the BIP—members of that group knew that follow-up was essential to implementing their recommendations, which were fully endorsed by Council Resolution 36438.

Morris described the survey of City Bureaus that the BIP performed and used to summarize what they were doing to evaluate and improve their customer service. They found a wide range of efforts among Bureaus, from none to very experienced. One large Bureau said they had no customers.

Morris stressed that methods for improving internal and external customer service are similar. She explained the rationale for resistance to improving customer service: it may be perceived as too time consuming, as inequitable, or as too difficult to meet each customer's demands. Bureaus perceive their customers as different from other Bureaus' customers. The

“Staff Workplace Aspirations Needed to Achieve Customer Service Excellence,” was created to address those concerns. Art Alexander, who also was a BIP member, explained that employees at any level who feel supported by their managers are more willing to give information and offer possible avenues of action to callers.

BIP # 7 determined that improving customer service will not be the same for everyone, and that a “toolbox” of different methods will be useful. Assumptions about customer service can lead to problems. For example, in an effort to be timely staff might give mistaken information that leads to problems later, if it is acted upon.

Members’ priorities and possible approaches

An informal brainstorming session followed, about how to approach the work of implementing the BIP recommendations, which is the charge of the CSAC. Ideas included:

- changing from a “regulator” to a “facilitator” role (which the Bureau of Development Services has done);
- getting customer service included in all Bureaus’ budget processes this year;
- requesting implementation plans from each Bureau; creating guidelines;
- reward employees for work reflecting the Customer Service Expectations
- start by evaluating Bureau Directors using that criteria—implementation must be top-down
- make sure new programs incorporate the customer service principles
- make clear that this is improvement, not penalty
- help Bureaus with implementation strategy
- must hire differently
- to measure success could use survey questions: “does the City work with you” and “does the City meet your needs” as well as those recommended by BIP # 7

Unresolved issues that came up in the discussion included:

- whether to allow or discourage variation among bureaus in their approaches to implementing BIP # 7 recommendations;
- the risk of the new Customer Service Expectations “dead on arrival” in practice—how to make it tangible
- if Commissioners are really “on board,” having passed the Resolution, why is this Committee needed?
- How to get old-timers to change
- What would success look like from Bureau perspective? How will Committee know when it has been successful?

Kaplan observed that the Committee’s work is really “change management,” the key components of which are: support from the top, including resources; realistic time frame; understanding of why the change is needed; something of value offered for change; system support to monitor; and accountability and feedback. Without these components, change might be only nominal, without action.

Members agreed that the practice of good customer service, as opposed to a veneer of customer service, would reward employees with a less adversarial, more creative job, and customers in the city would benefit.

Mayor’s support

Mayor Potter visited the meeting and told the Committee that he appreciates their work. He said that interaction with citizens is the key to our work. Citizens are part of government—focus on how we meet the needs of citizens is different from simply how we do our jobs. Mayor Potter said his job is to provide an environment where people can succeed. We need to look at how we interact with the community, and ask ourselves what we have accomplished with the money and time spent. He views the work of this Committee as connected with the visioning process and other collaborative work in his office. Improving customer service will make citizens feel better about government and within the city will make us feel better about what we do. Consistent treatment and response are key.

Public meeting law and CSAC decision-making

Woodward provided copies of Public Meeting Law, ORS 192.610 – 192.690 and explained how the law applies to this Committee. More requirements, such as minimum meeting notice time, apply to meetings of advisory committees for which a quorum is required for decision making. She asked the group to decide how they want to make decisions. Committee members agreed that they prefer to work by consensus and prefer not to institute a quorum requirement. All members agreed that they are comfortable with having open meetings and records. Even though members do not plan to decide via majority voting, members can abstain from consensus decisions.

Woodward also asked whether members want to name a lead facilitator or chair. Morris and Mills are not the co-chairs of the Committee, although they were BIP # 7 co-chairs. The Committee prefers to try working without a lead for the time being. Woodward agreed to provide limited meeting facilitation while taking notes. She will email draft meeting notes to Committee members and release them to others after approval by the Committee.

Meeting dates & times

The Committee decide to meet on the second Monday of each month, during lunch, 12:00 to 2:00 p.m. The next meeting will be on December 11.

Immediate Goals

Several members said that it was essential for Bureaus to know now that they should include customer service improvements in the current budget process, so that they actually plan for, analyze and evaluate their customer service. The Committee decided to ask Mayor Potter to contact Commissioners to remind them and their Bureau Directors to incorporate

BIP # 7 recommendations into budgets for fiscal year 2007-08. They asked Woodward to draft an email from the Committee to Mayor Potter as soon as possible. She agreed and said she would send the draft to members for their changes.

The Committee also asked Woodward to send the link to Audit Services' surveys so that Committee members can review the questions already included and consider what other questions would be useful. Woodward explained that it would be very difficult to get any new questions added to the Resident survey because it already is long. When Audit Services adds a question they also delete something.

Art Alexander volunteered to coordinate attempting to get a question added to the Resident Survey, for the Committee.

Agenda for
December 11

At the next meeting the Committee will work to create a short list of actions they want to take, and create a plan for the next six months to one year. They will consider short term versus long term implementation goals.

Handouts:

- Meeting Agenda
- List of CSAC Members and contact information,
- Council Resolution 36438 and BIP No. 7 Final Report
- Public Meeting Law