

**Customer Service Advisory Committee****Meeting Notes****Meeting Date:** September 2, 2014**CSAC members present:** John Dutt, Tina Keller, Terre Neubauer, Barbra Rice**Others present:** Tenzin Choephel

Topic	Discussion	Action/ Decision
Welcome	John introduced Terre Neubauer as the new BTS representative. Terre said she is BTS' new Customer Relations Manager.	John and Terre will schedule a time to get together for a CSAC orientation.
CAO's Office	<p>John updated the group about a recent meeting with Fred Miller, OMF's Chief Administrative Officer. Fred asked to meet with ONI Director Amalia Alarcon Morris, John and Tenzin. Due to scheduling conflicts, John and Amy Archer (ONI) met with Fred.</p> <p>John said that Fred was interested in having ONI be the lead bureau in a Citywide effort. John advised a group of bureaus would be better, particularly ones that have been more engaged with the CSAC areas of focus. John shared contact information for individuals at Revenue, Water and Parks.</p> <p>Terre shared that the CAO's Office has developed a "<a href="#">customer service framework</a>" for OMF. In response to Tina's question, John said he brought up the connection to CRM/311 and Fred said Celia from his office is keeping him briefed on that work.</p>	
CRM/311 update	<p>John and Tina shared that the Stern Consulting work is underway. The Steering Committee last met on August 28<sup>th</sup>. Stern has completed interviews, surveys, and focus groups, and plan to conduct targeted outreach to remaining bureaus. Barbra said Revenue submitted a name of potential interviewees but has yet to be contacted. Thus far, it appears some bureaus not as interested as others – PWB is reluctant to adopt CRM given its work in this area; Barbra said Revenue has concerns about CRM for tax collections but something like leaf fee may be manageable.</p> <p>While technology solutions have not been discussed, Salesforce is an existing vendor for BPS.</p> <p>John said Stern's presentation to City Council is scheduled for November 12, 2014.</p>	John to follow up with Laura Wolfe, BOEC project manager, about Revenue.
Customer service training	John hopes to schedule the next City/County Frontline Meeting for some time in September.	

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General updates    Danielle Brooks replaces Shoshanah Oppenheim as the City’s ADA contact person.

Parks is reviewing its customer service standard to be more inclusive, and has created a committee to help with this work. John is a member.

Revenue is now a division within the Bureau of Revenue and Financial Services. There is a recruitment for [Revenue and Tax Specialist 2](#) that includes a preference for applicants with skills in language(s) other than English.

PBOT is about to fill two positions for its front desk. PBOT is also in the process of evaluating proposals for the PBOT customer intake review RFP. Regulatory unit staff (about 9 FTE) previously at Revenue were migrated to PBOT as of July 1<sup>st</sup>. Staff remain located at Revenue’s office space until PBOT identifies its long-term plans for the unit.

BTS is using its communities of interest to get feedback on the Citywide IT Strategic Plan (in development, prior plan has since expired). BTS is requesting budget add packages to restore staffing levels, particularly in areas like the HelpDesk.

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Next meeting        The next committee meeting is Tuesday, November 4<sup>th</sup> from 1:30-2:30pm.

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