

Bureau Innovation Project Phase I – Work Plan

Number & Recommendation	7. Direct all City bureaus to work collaboratively with their employees and with each other to develop improved Customer Service policies and procedures.		
Date	August 3, 2005	End date to Implement (if known)	12/31/05
Co-leads <small>(indicate point person to facilitate communications between the Mayor's Office)</small>	Michael Mills (#34503) & Bonnie Morris (#37883)		

Team 7 met once on 6/6. 10 of the 16 currently assigned members were in attendance. The workplan presented below is the initial response resulting from spirited brainstorming. The team expects to refine the plan in future meetings. The group agreed to meet every other Monday, starting on 6/13.

1. Given the nature of the recommendation, what are some working values or principles to guide the work team?

- Respect for customer needs/customers are important
- Employees are empowered to be problem solvers
- Employees are given customer service training & their efforts are supported
- Develop a culture of facilitation, not just regulation
- Speedy response
- Customer service expectations will be consistent across all City bureaus.

2. What actions are necessary to develop an implementation plan for Council to review and adopt?

Action	Target Date of Completion
• Reach consensus on customer service values & behaviors	
• Have each bureau identify their key customer groups	
• Conduct customer service focus groups	
• Request bureaus or major work groups to draft strategy for improved customer service.	
• Work with HR to incorporate customer service values & behaviors into job descriptions, recruitment processes and employee evaluation tools	
• Develop a "Portlandonline" sub-site for customer a customer service forum	

NOTE: We will discuss these further and assign dates at our next meeting	

Notes:

3. How do the proposed actions take into consideration the suggested approach from the discussion draft for the recommendation (found in Part 1 of the *Report on the Bureau Innovation Project*).

All three of the recommendations were briefly discussed and the group felt each had merit. They will continue to be discussed in future meetings.

4. How have all opinions of work team members been incorporated into this work plan?

Everyone in attendance at the meeting participated in the discussion. A draft of this document was sent to all team members for their comments.

5. What questions does the work team have for the Implementation Team (Councilors, bureau directors, and key stakeholders) on June 9?

Questions	Notes
<ul style="list-style-type: none"> As we continue to progress, what are the interim products you will expect from us? Will team work products be shared with all teams? 	
<ul style="list-style-type: none"> Is there a single communication plan for letting the public and city staff know the progress of the teams? 	
<ul style="list-style-type: none"> We assume that we can add staff from additional bureaus if their input is needed. Are we correct? 	
<ul style="list-style-type: none"> Once we have completed our work, what happens to our recommendations? 	

6. How will each team member report to and elicit feedback from direct service employees from her/his bureau in the work team? (compile team member responses below, or attach separate sheets from each team member)

We discussed the need for a team communications plan, but did not have enough time in this meeting for each member to respond with their individual plan for their bureau. We will do that at our next meeting.

7. What are the staffing needs of the team in order to develop an implementation plan to be reviewed by the Implementation Team?

- Some bureau resources to collect data regarding their customer base
- Facilitator services for customer focus groups
- BTS assistance to develop a customer service forum on “PortlandOnLine”

Report submitted by: Michael Mills & Bonnie Morris
Sponsor/Chair

Upcoming Phases for Each Work Team (note: teams will progress through phases at varying rates; some teams have deadlines—see schedule; phases will be refined as process develops)

Phase I—Work plan Development

Teams describe actions/timeline to develop a detailed implementation plan.

Phase II—Definition and Assessment of Issue(s) Raised by Recommendation

Teams define the issue(s) raised in their recommendation and assess the issue(s) by describing current status, past efforts to address issue(s), strengths and weaknesses, and other appropriate areas to gain a better understanding of the issue(s).

Phase III—Option Identification and Impact Analysis of Each Option

Teams review definition/assessment of issue(s); research and identify options to address issue(s); and analyze the merits of each option.

Phase IV—Option Review by Work teams

Teams discuss, develop, and select options for recommendation to the Implementation Team.

Phase V—Option Selection by the Implementation Team (

Implementation team reviews and decides upon options for implementation of recommendation.

Phase VI—Implementation/Transition Plan Development

Teams develop implementation and transition plans for recommendation, including budget/contract estimates.

Phase VII—Adoption by Implementation Team

Implementation team reviews and adopts implementation/transition plans to make each recommendation materialize.