

## MEETING NOTES

Revenue Division Labor-Management Committee  
May 24, 2016

Attendance:	Adrienne Brown-Dunn, Rachel Cleveland, Jayden Dotson, Karla Frahler, Josh Gregor, Scott Karter, Thomas Lannom, Karen Obana, Terri Williams
Facilitator:	None
Note Taker:	Meghann Fertal
Handouts Distributed:	Meeting Notes 03/22/2016 version 2 & Call Monitoring document

1. Review of March 22, 2016 notes
  - a. Approved
2. Budget (F)
  - a. BLT tax increase was not approved by council
  - b. New positions from approved budget:
    - i. RTS III – UCT permanent ongoing
    - ii. RTS IV – STR permanent ongoing
    - iii. Program Coordinator – DEAP OCT perm ongoing
    - iv. Auditor – for OCT in Audit one-time
    - v. Senior Management Analyst – IRS Liaison one-time
    - vi. Business Systems Analyst – for IRS in BSD one-time
    - vii. RTS (level TBD) – Heavy Vehicle Use Tax 5 yr. limited term
3. Interviews for RFP/LMC Facilitator (F)
  - a. Facilitator should be in place by next meeting, June 28.
  - b. Finalists will meet panel this week and next week
4. Picnic Plan Update (D)
  - a. August 20 @ Gresham City Park
  - b. Sub-committee to send email to all staff as a reminder and request attendance numbers
5. OMF LMC (F)
  - a. Will be on hiatus for the summer, June-August
  - b. Working on membership recruitment as it is mostly managers
  - c. Agenda items
    - i. Budget
    - ii. New administration – Ted Wheeler, Mayor Elect
6. Employee Satisfaction Survey (D)
  - a. Everyone to bring back top 2-3 issues by next meeting
  - b. Agenda item: plan of action to complete by the end of the year

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- c. Management: If there is a disagreement on themes between Labor and Management, how will we proceed?
  - i. Labor: it would depend on the theme, proposed alternatives, impacts, etc.
  
- 7. All-Staff Meeting (D)
  - a. Phishing Emails and Cyber Security (Karter)
  - b. General Reminders (Meghann)
    - i. Office supplies
    - ii. Kitchen
    - iii. FMLA/OFLA
    - iv. Ergonomics
  - c. IRS/FTI Update (Thomas)
  - d. Tax Season Recap (Ellertson and Rice)
  - e. Budget Update – positions (Thomas)
  - f. Safety Committee Update (Karla and Allen)
  - g. Equity Committee Update (Kelly and Huitzi)
  - h. LMC Committee Update (Rachel)
  
- 8. Call Monitoring in Tax Division (C)
  - a. Call monitoring discussed in April 2016 since a new tool was added (screen “scrapes” (screen capture))
  - b. Labor: which employees are subject to call monitoring?
    - i. Management: anyone with an Avaya phone including Tax Division staff but not Mailroom staff, Audit and Accounting Division (but not our two accountants).
  - c. Labor reiterated the questions on their handout, Management said they were not prepared to answer questions in detail, but gave the following high-level responses on the different topics:
    - i. Criteria: difficult to have hard and fast rules for criteria due to the unique nature of calls. Criteria is relational to what the customer called about i.e. situational and will be subjective. Certain elements are expected within a phone call (ex. Greetings, tone, etc.).
    - ii. Review: not all calls will be reviewed with the call taker, an example is overhearing a training opportunity or customer complaint. many calls will be made together with trainer or supervisor.
    - iii. Purpose: employee training, mentoring, coaching and discipline (very rare).

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Revenue Division LMC 5/24/2016

Labor Request for Information Re: Business Tax Division Phone Call Monitoring

Two Tax Division Staff Meetings of April to May 2016 have included brief presentations regarding phone call monitoring. In the first meeting, an RTSIII call was listened to by those present and the supervisor commented on various points covered in the call. In the second meeting, a brief presentation was given by the Tax Division trainer, with a short discussion, of approximately 5 minutes. This has been the most in-depth presentation to date which included a list of criteria calls will be reviewed by. Most RTS series Tax Division Staff were present at both meetings, with the exception of Front Counter and Mail Room and no Auditors or Accounting staff were present. The following Call Monitoring Basics were presented, as an agenda item:

- Frequency
- Criteria
  - Tone
  - Target the Question
    - Confirm Understanding
  - Call Management
    - Handle Time
    - Control
  - Accuracy
  - Appropriate Hold / Transfer

Labor contends that this is inadequate information to ensure the mutual success of this procedure. We request that specific information be provided to all staff who are or will be effected by call monitoring. A list of initial questions follows:

- Purpose
  - Coaching?
  - Training?
  - Discipline? (Labor requests that articles 33 and 33.1 of the DCTU agreement be adhered to)
- Who will be reviewed
  - All RTS staff?
- Who will be reviewing
  - Side by side call review and scoring with both trainer or supervisor and rep
  - Random audit of calls
- Frequency
  - Set monitor schedule for all RTS staff?
  - Less frequent when a certain number of passed calls have been reviewed?
- What constitutes a failed call

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- Is there a grading system?
  - Weighted criteria
- What constitutes a passed call
  
- Expectations
  - Are staff adequately trained in all points of review?
  - Same for RTSII through RTSV?
  - Are all reviewed standards clearly outlined and addressed in training?
- Handle time expectations
  - Is there a standard?
- Tone
  - How is tone assessed?
  - Situational, RTS Level considered?
- Customer service skills training
  - Listening to ensure understanding
  - Empathy/affirmation
  - Call control
  - Dealing with escalated calls
- Documentation
  - Consistent evaluation process for all calls
  - Score sheets
  - Where are they kept?
- How is tone assessed
  - Situations may require variation in tone