

EXHIBIT A

311 Program IMPLEMENTATION REFINEMENTS

This document refines the **311 Implementation Plan**, available at www.tinyurl.com/Portland311, based on planning completed between January and October 2019.

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Program Overview

Description

The 311 Program will provide a single point of contact for community members – including residents, business owners and visitors – to access City government and the services it provides. The program's mission is to simplify community member access to services by serving as a welcoming and knowledgeable front door for both the City and the County government. The 311 Program will also provide valuable data and insights into the community's needs and interests, allowing Bureaus and City Council to make more informed service and communication decisions.

The 311 Customer Service Program's staff will help community members find information, report issues, and request City services online, over the phone and in-person at City buildings. The 311 Program will provide information and referral services for all bureaus and will build capacity to intake and resolve service requests over time. The program will also provide information and referral services to the community for other local government, community and social services, including vital and time sensitive public notification in emergency and disaster.

Vision, Priorities, and Desired Outcomes

Vision

Portlanders can easily and effectively access City information and services, regardless of language, ability or resources. They are empowered to contact their government. They get accurate answers quickly and easily and feel confident that their needs and voices are being heard and considered.

City employees use a service-first approach in their interactions with community members and are empowered to provide high quality customer service. They have the tools, technology, and capacity for a service-first approach to customer service. Improved workflows enhance the speed and accuracy of service and mean Bureaus' program staff have more capacity for their specialized responsibilities.

City leaders and decision-makers have timely information about community issues and desires. As a result, the City and its Bureaus more effectively and efficiently address the community's needs.

Operational Priorities

With the initial implementation of a Citywide 311 Program, the City aims to:

- Establish a functional and **successful 311 program** that improves and **simplifies** community access to government information and services.
- Use a foundation of **equity & universal design** to expand access to government information and services for all Portlanders.
- Leverage **existing investments**, including institutional knowledge, technology, and regional partnerships.
- Pursue 311 enhancements that will **reduce non-emergency calls** to 911 call-takers, in coordination with other efforts.

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Desired Outcomes

Once the 311 Program is implemented, the City intends to achieve the following outcomes:

Community members and customers...

- Find the process of getting help is easy, quick, and convenient; the information they receive is accurate, comprehensive, timely, and easy to understand;
- Feel welcomed and trust their needs are heard and valued.
- Can readily access City services and information, regardless of ability, language, economic status, political influence or historic community representation in City decision-making.
- Can quickly and easily reach the right information or person to resolve their request. They don't need to understand the City's form of government to access information or services.
- Have multiple ways to access City information and services, including on their mobile phone, tablet or computer; over the phone; and in person.
- Can conveniently and safely pay for City services, where required.

The City and its employees...

- Benefit from an integrated customer service system that improves the public's perception of City, as a government agency and as an employer.
- Have an improved workflow for customer service requests that improves levels of service while saving time and money and reducing workloads for City staff.
- Have an integrated customer service system that is adaptable, over time and to diverse needs, is well-implemented and funded, and has strong leadership.
- Are empowered to provide quality customer service and have the necessary tools and knowledge.
- Use an integrated customer service system built on, and integrated with, appropriate and well-supported business applications.
- Have access to quality data that can inform and improve City services, policies, and outreach methods.

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Program Governance

Organizational Structure

Beginning no later than July 1, 2020, the 311 Program staff and associated operational authority will be located in the Office of the Chief Administrative Officer (CAO) within OMF. Housing the 311 Program within the Office of the CAO will advance the Office's values of service, equity, and innovation; enable the program to benefit from the Office's expertise in management of citywide initiatives; and provide an opportunity to align the 311 Program with other enterprise customer service improvements.

311 Leadership Team

Program leadership and high-level decision-making will be shared by the Bureaus who are developing and implementing the 311 Program:

- OMF – Office of the CAO
- Office of Community & Civic Life
- OMF – Bureau of Technology Services

The 311 Program will use a collaborative decision-making structure where the program's Leadership Team partner in making significant program decisions. While this model will require the commitment of multiple leaders, it brings the benefits of multiple perspectives and the unique expertise of each implementing bureau. The Office of Community & Civic Life brings a critical connection to community members, organizations and stakeholders and an overall mission of promoting a culture of civic engagement by connecting all Portlanders with each other and their government. The Bureau of Technology Services will contribute their expertise in citywide technology programs and initiatives, including components critical to the successful implementation of the 311 Program: the Portland Oregon Website Replacement Project (POWR), webform replacement, service desk solutions, information security, and telecommunications.

Figure 1. 311 Program Leadership and Organizational Structure

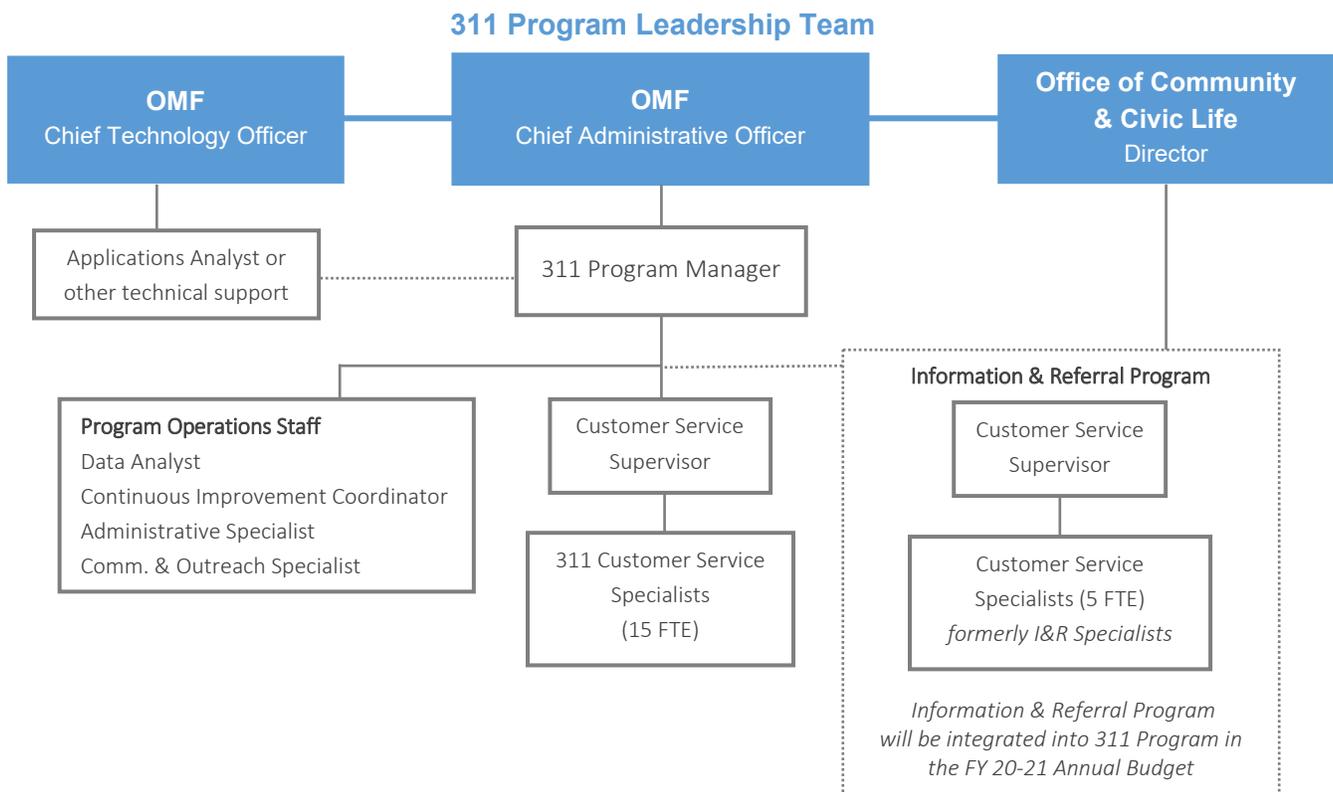


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311 Advisory Committee

The ongoing involvement, input and oversight of partner bureaus is critical given the 311 Program's citywide reach and community importance. The 311 Program will convene a 311 Advisory Committee to provide a forum for bureau input and provide a trusted mechanism for:

- Communication from the program to partners regarding trends, program changes, and levels of service.
- Feedback from city bureaus to the program regarding what's working well, what's not, and potential improvements
- Collaborative innovation for program enhancement

The 311 Advisory Committee will include the Director, or appointee, of Bureaus with large customer service functions or other stakeholder interests, including:

Bureau of Development Services	Portland Bureau of Transportation
Bureau of Emergency Communications	Portland Fire & Rescue
Bureau of Environmental Services	Portland Parks & Recreation
Bureau of Planning and Sustainability	Portland Police Bureau
Bureau of Revenue and Financial Services	Portland Water Bureau
Bureau of Technology Services	Office of Equity and Human Rights

Regional Partnerships

The following regional partners should be engaged in the exploration and development of a multi-jurisdictional 311 Program:

- Multnomah County
The City has a long-standing partnership with Multnomah County to provide joint Information & Referral Services. In FY 2019-20, the 311 Program will engage Multnomah County in a discussion regarding the potential of a joint City/County 311 Program. Should there be mutual interest and benefit in creating a bi-jurisdictional program, the agencies will define the scope of a joint initiative and the respective City / County roles and contributions. Any recommendations would result in a revised Intergovernmental Agreement for the review and approval by the Portland City Council and Multnomah County Commission.
- 2-1-1 Info, which provides connections to community and health services
- BOEC and jurisdictional partners in the Portland 9-1-1 System

In the future, the 311 Program could explore establishing regional partnerships with additional interested partners, potentially including Metro, TriMet, the Port of Portland, and other governmental agencies.

Co-location Opportunities & Efficiencies

As the 311 Program grows, it will need adequate space for staff. The City's Long-range Facilities Master Plan effort is incorporating these needs into future space plans. The 311 Program is also exploring opportunities to co-locate a future call center with the City's 9-1-1 call center. Such colocation could bring locational advantages, such as the ability to leverage existing facility and technology investments, as well as the potential to respond to emergencies and disasters in a more coordinated way.

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City Service Delivery

The 311 Implementation Plan recommended a multi-year phased implementation of a 311 Program that provides in-person, online and phone customer assistance, serves a key function in maintenance of the City's website and service directory, and supports process improvement for City services.

FY 2019-20 Focus Areas

Information & Referral

The 311 Program will continue to provide information and referral services for all City Bureaus, Multnomah County, and a variety of other local, state, and federal agencies. The City/County Information & Referral Program has provided Portland residents, businesses and visitors with valuable information and connections to government services for over 25 years.

311 Services

In FY 2019-20, the 311 Program will focus on:

- **Service intake and resolution** for approximately 25 to 50 'Phase 1' services that are currently available through the City's website, including Portland Parks & Recreation simple class registrations and permits.
- Redesigning and centralizing intake of **ADA and language accommodation** requests or complaints
- Additional **process improvement** to prepare for the migration of 'Phase 2' services.
- Working collaboratively with BTS and service bureaus to redesign, update, and migrate existing service webforms (a.k.a. TrackIt) and related instructions and reference materials to a **new webform and service desk solution**.

Portland Building Customer Service Zone

To support consistent and cohesive customer service, the Portland Building's Customer Service Zone will be operated as part of the Citywide 311 Program. Citywide 311 Program Customer Service staff will provide information and access to City programs and services, including intake, resolution, or referral, at the Portland Building's main Customer Service Desk on the 1st floor.

The Portland Building's Customer Service Desk opens:

December 16, 2019

BOEC / 9-1-1 Partnership for non-emergency call diversion

The 311 Program will continue to work closely with the Bureau of Emergency Communications (BOEC) and its 911 call-takers, dispatchers, and operational staff to:

- Provide **in-service training** on the capabilities of the existing City/County Information & Referral Program. *(Completed, 2019)*
- Add a **keypad transfer** button to allow 911 call-takers to quickly and easily transfer calls to an I&R Program Specialist. *(Completed, 2019)*
- Redesign the non-emergency (503-823-3333) interactive voice response (**IVR**) menu to make it easier for callers to self-triage their needs and reach the appropriate call-taker. *(In-progress, 2019)*
- **Migrate appropriate services** to the 311 Program to expand their capacity to intake and resolve non-emergency calls. For example, the 311 Program could assist Portlanders in filing certain non-emergency police reports or in requesting copies of existing police reports. *(Pending, 2020)*
- Conduct a coordinated **911-311-211 public education campaign** to encourage community members to place the right call to the right number. *(Planned, 2021)*

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Service Phasing

Table 1. 311 Service Delivery Plan

FIND	Bureaus Served	311 will...		
		Help 1: FY19-20 2: FY20-21 +		Triage & Refer
Find opportunities with the City:				
Employment opportunities	BHR, All	✓	1	
Contracts/Bids opportunities	BRFS, All	✓	1	
Volunteer opportunities	Many, All	✓	2	
Find general information about the City, such as:				
Hours & locations of City facilities	All	✓	1	
Contact information for City programs & staff	All	✓	1	
City Council agendas	All	✓	1	
Parking rules	PBOT, PP&R	✓	1	
Locations/amenities at parks & facilities	PP&R	✓	1	
Smart Trips/Trip Planning	PBOT	✓	2	
Find property or neighborhood information, such as:				
Utility providers	n/a	✓	1	
Online zoning & permit information	BDS	✓	1	
Neighborhood Association / Coalition contacts	Civic Life	✓	1	
Land use notices	BPS, BDS	✓	1	
Details of a person- or property-specific notice received	Various			●
Find timely information and schedules, such as:				
Construction updates	PBOT, PWB	✓	2	
Emergency information (e.g. weather hazards)	PBEM, All	✓	1	
Information about City plans or projects	Many, All	✓	2	
Garbage/Recycling/Compost schedules	BPS	✓	1	
Leaf pickup schedules	PBOT	✓	1	
Public events and meetings	All	✓	2	
Apply for a City Board or Commission	Various	✓	1	
Find information or report issues to other agencies, related to:				
Animal services	Mult. County			●
Air quality issues	State of Oregon			●
Elections	Mult. County			●
Electricity, natural gas or other utilities	Private entities			●
Health services	Mult. County			●
Local, state and federal courts	State, Federal			●
Parking Citations	Court			●
Problems on State highways or County roads or bridges	Mult. Co, State			●
TriMet questions or concerns	TriMet			●

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REPORT	Bureaus Served	311 will...		
		Help 1: FY19-20 2: FY20-21 +	Triage & Refer	
File a request, comment, or complaint, such as:				
ADA or language access request or complaint	All, OEHR	✓	2	
Claim against the City	BRFS, All			●
Police commendation or complaint	IPR, PPB			●
Policy or project-related comment	Various	✓	2	
Public records request	Archives, All	✓	2	
Report a violation of City code or policies, such as:				
Code complaints	BDS	✓	2	
Discrimination, fraud or abuse by the City	Auditor			●
Noise violations	Civic Life	✓	1	
Liquor violations	Civic Life	✓	2	
Report illegal activity or file a police report (non-emergency only):				
Graffiti	Civic Life	✓	1	
Illegal campsites	Civic Life	✓	1	
Illegal parking	PBOT	✓	2	
Certain other crimes (online police report)	PPB	✓	2	
Report problems at City facilities or in the right-of-way, such as:				
Abandoned auto	Civic Life	✓	1	
Abandoned bike	PBOT	✓	2	
Containers in right-of-way	PBOT, BPS, BDS	✓	2	
Construction without permit	BDS	✓	2	
Park maintenance issues	PP&R	✓	2	
Parking meter issue	PBOT			●
Private-for-hire complaints	PBOT	✓	2	
Sidewalk obstruction/hazard	PBOT	✓	2	
Sign, light, or signal issues	PBOT	✓	2	
Vegetation concerns	PBOT	✓	2	
Work zone concerns	PBOT	✓	2	
Report an urgent hazard that requires dispatch, including:				
Clogged stormwater drains	BES, PBOT	<i>311 could intake in the future, if practical and desired.</i>		●
Debris/hazard in roadway	PBOT			●
Water leak	PWB			●
Pollution spills	BES			●
Hazardous trees	PP&R, PBOT			●

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REGISTER or APPLY	Bureaus Served	311 will...		
		Help 1: FY19-20 2: FY20-21 +		Triage & Refer
Register for City services, such as:				
Clean River Rewards	BES			●
Community Safety assistance	Civic Life			●
Housing programs	PHB			●
Recreation class or camp	PP&R	✓	1	
Room, park, or facility reservations	PP&R, OMF	✓	2	
Street improvements, like bike racks or curb ramps	PBOT	✓	2	
Sustainability at Work	BPS			●
Water / Stormwater service	PWB, BES			●
Apply for a simple permit, including:				
Alarm permit	PPB	✓	1	
Block Party permit	PBOT	✓	2	
Noise variance	Civic Life	✓	2	
Sidewalk/Driveway repair permit	PBOT	✓	2	
Simple temporary street use permit	PBOT	✓	2	
Apply for a complex permit or review, such as:				
Development permit	BDS, Various	<i>311 could intake in the future, if practical and desired.</i>		●
Building or trade permit	BDS			●
Complex temporary street use	PBOT			●
Land use review	BDS			●
Tree permit	PP&R			●
Sidewalk café permit	PBOT			●
Sign permit	BDS			●
Special event permit	PBOT			●
Vending permits	PBOT			●
Apply for a business-related registration, including:				
Business tax	BRFS			●
City vendor status	BFRS			●
Cannabis License	Civic Life			●
Liquor license	Civic Life			●
Private-for-hire	PBOT			●
Transient lodging	BRFS, BDS			●
PAY				
Pay for City services, such as:				
Fees for 311 provided services	Various	✓	1	
Fees for non-311 services	Various			●
Request alternate payment plan	Various			●

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Supporting Technology

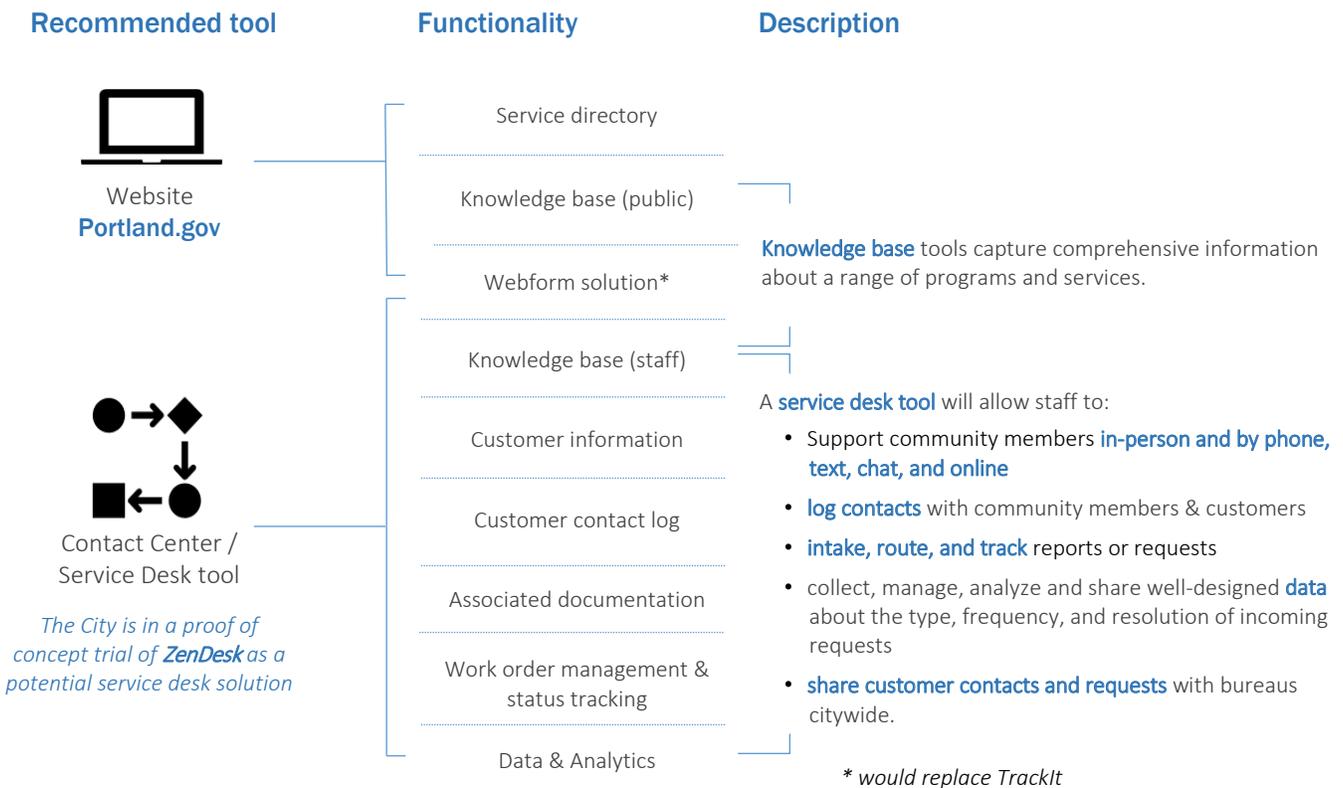
Software Tools

New software tools will facilitate and support 311 Program staff’s ability to provide high-quality customer service.

At a minimum, the tools will:

- Meet functional business needs of the 311 Program, see descriptions below.
- Be able to support multiple customer service channels, including phone, in-person, online, text, and webchat.
- Be easy to use by 311 staff and Bureau liaisons.
- Integrate with other Citywide technology, particularly the Portland.gov website and with appropriate legacy business applications, if desired in the future.
- Minimize duplication of data or information in multiple places or systems.
- Conform to information technology requirements, such as those regarding data security and accessibility.

The 311 Project Team is working with BTS to implement the following recommended tools:



Note: Similar Customer Relationship Management (CRM) platforms may provide other functionality that will not be addressed by these recommendations as they are outside the scope of 311 service delivery – including the ability to track and manage donor and volunteer relationships, sales, and marketing communications.

Technology Costs

The 311 Program anticipates three primary costs for the technology migration described above:

1. One-time costs to support the improvement and **migration** of webforms to a new technology solution. The 311 Program anticipates using existing funds to add capacity to existing BTS funding for this migration.

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2. One-time costs to configure and **implement a contact center management/service desk tool** for the 311 Program, estimated at \$100,000.
3. Ongoing **technical support** costs to support the development and management of program-related forms, workflows, and service desk functions; migrate the program's knowledge base; and set up data management, analytics, and reporting capabilities. The 311 Program budget assumes this need is met via a BTS Applications Analyst (1 FTE), embedded in the 311 Program, with costs based on BTS' labor rates (approximately \$210,000 per year in FY2019-20). However, there may be alternate ways to meet this need.
4. Ongoing costs for contact center/service desk solution **licenses**, assumed at approximately \$160 per month per agent license.

Establishing the 3-1-1 Phone Number

While the City has existing authorization to use the 3-1-1 number for community access to local government services, enabling community members to call 3-1-1 will require:

- Working with regional partners, including Multnomah County and its jurisdictions, to set the geographic boundary for a 3-1-1 number.
- Working with cellular and landline phone providers to direct 3-1-1 calls to a dedicated 10-digit city phone number (either 503-823-4000 or 503-865-0311). This will require separate coordination with each of the region's four cellular providers (AT&T, Sprint, Verizon, and T-Mobile); two landline providers (CenturyLink and Frontier); as well as consideration of VOIP providers, all in collaboration with the Bureau of Technology Services, Office of Community Technology, and the City Attorney's Office.
- Working with BTS to ensure internal telecommunications networks are appropriately right-sized for call-loads and configured to ensure calls are correctly routed.
- Configuring the 311 Program's service desk solution to create, manage, and track tickets initiated by phone.

Data & Analytics Program

The City currently lacks consistent, centralized information about why and how community members contact the City. The 311 Program, in coordination with the Portland Oregon Website Replacement (POWR) project, represent significant opportunities to advance the City towards a more data-informed service delivery approach.

A 311 Program and associated service desk solution could gather, store, track and manage data about information and service requests and service delivery and use this data to:

- Monitor program performance and identify ways to improve outreach and service delivery
- Predict and prepare for busy times and seasons
- Tailor services to match community needs and preferences

The 311 Program will also support Bureaus and City leadership in their efforts to:

- Be responsive to community requests
- Identify gaps in service outreach or delivery
- Provide insights into the needs of the community and discover emerging issues or evolving public needs

The 311 Program will employ a program analyst who can analyze and report on the information collected by the 311 Program. These reports and data will be accessible to City Bureaus, leadership, and the public to support continuous improvement of City service delivery.

Caution: Relying on community reports or requests to prioritize City services may skew service delivery away from communities who are less engaged, face more barriers, and/or are less comfortable contacting the City. To

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ensure more equitable decision-making and service delivery, **Bureaus and City leadership should use 311 data on community requests and reports to inform, but not determine, service delivery.**

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Customer Service Resource Study

The City's has an interest in preserving and leveraging the institutional knowledge, skills, and expertise of its staff. It also faces the reality of limited new financial resources for the 311 Program. Given these goals and realities, the 311 Program is undertaking a Customer Service Resource Study to understand and recommend the best way to identify and migrate future 311 services.

The Customer Resource Study, being developed with the assistance of outside organizational consultants and with significant input from partner bureaus, will:

- a) Assess existing service metrics for a variety of potential 311 services, including volume and type of contacts;
- b) Identify current service delivery methods, including staff classifications, specialized skillsets, technologies, and funding mechanisms;
- c) Identify the potential benefits and risks of migrating a given service to the 311 Program;
- d) Recommend the best way to migrate service delivery to the 311 Program, from among the following options:
 - Migrate the service to 311 by **training 311 employees** in the associated knowledge, skills, and tools.
 - Migrate the service to 311 by **recruiting existing employees** who bring the associated knowledge, skills, and tools.
 - Migrate the service to 311 by **transferring existing employees** from bureau programs to 311.
 - **Not migrating** the service to 311 – service delivery and associated staff stay with the existing bureau.

The recommendations will set the foundation for future 311 service expansion and associated staff and resource plans and may further refine the 311 Program Staffing recommendations, beginning on page 13, as well as the Program Budget, see page 19 of this document.

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311 Program Staffing

This analysis documents the assumptions and methods used to develop the staff recommendations for the Citywide 311 Program.

Recommended Staff Positions and FTE

Table 2. Staff Positions

Position ¹	Role
311 Program Manager (Manager I)	Directs the 311 Program and maintains relationships with City and partners' leadership and elected officials. Ensures delivery of 311 services and institute policies and processes to monitor and continuously improve customer service.
Customer Service Supervisor (Supervisor I)	Supervises specialists in the call center and in-person locations. Oversees continuous improvement efforts and develops policy and procedures for the program. <i>Workload considerations: Recommended FTE is based on best practice of 1 supervisor per 10 customer service staff. In FY 19-20, supervisor will oversee 5.0 Customer Service Specialists and 5.0 Information & Referral Specialists (total of 10 FTE). FY19-20 Supervisor I is an existing staff position within I&R.</i>
Customer Service Specialists (I & II)	Respond to community member questions and requests professionally, accurately and thoroughly, in both the in-person and phone service centers. <i>Workload considerations: Recommended FTE is based on the services provided, anticipated contact volume, hours of operation, and performance targets, see full documentation in next section. FY21-22 FTE assumes the opening of a 311 Call Center.</i>
<i>Information & Referral Specialists</i>	<i>Existing program staff will continue to provide I&R services. I&R Program and staff would be incorporated into the 311 Program, via reclassification of existing positions, for FY20-21.</i>
Administrative Specialist II	Provides administrative support to Program staff and leadership, including human resources, payroll, accounting, budget preparation, and other responsibilities.
Analyst II	Analyzes, evaluates, and reports on operational and performance metrics, including GIS data, and identifies opportunities for improvements or efficiencies. Provides analysis to the program, Bureaus and City leadership to support service delivery improvements.
Application Analyst II	Develops and maintains program-related forms, workflows, and service desk functions; migrate the program's knowledge base; and sets up data management, analytics, and reporting capabilities within associated technology solutions. <i>Note: There may be alternate, preferred ways (e.g. vendor support) to meet the program's need for technical support.</i>
Coordinator II	Lead efforts to enhance and expand intake, routing, and tracking of reports, requests, and applications in collaboration with partner Bureaus; work to ensure the City's website includes accurate and timely information; oversee the program's training program.
Communication & Outreach Specialist	Creates and disseminates public information materials, leads community outreach and public relations activities and campaigns, and responds to media inquiries.

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Table 3. Recommended FTE

Position	Adopted FY 2019-20	Total FTE Projected		
		FY 2020-21 <i>high confidence</i>	FY 2021-22 <i>moderate confidence</i>	FY 2022-23 <i>low confidence</i>
311 Program Manager (Manager I)	1.0	1.0	1.0	1.0
Administrative Specialist I	0.5	0.5	1.0	1.0
Analyst II	0.0	1.0	1.0	1.0
Continuous Improvement Coordinator (Coordinator II)	0.0	1.0	1.0	1.0
Communications & Outreach Coordinator (Coordinator II)	0.0	0.0	1.0	1.0
Customer Accounts Specialist I	2.0	7.0	11.0	16.0
Customer Accounts Specialist II	0.0	1.0	2.0	4.0
Information & Referral Specialist	5.0	0.0	0.0	0.0
Customer Service Supervisor (Supervisor I)	1.0	1.0	2.0	2.0
Application Analyst II (BTS) ¹	0.0	1.0	1.0	1.0
TOTAL FTE	11.5 FTE	13.5 FTE	21.0 FTE	28.0 FTE

1 Assumed; There may be alternate, preferred ways (e.g. contracted vendor support) to meet technical support needs.

Customer Service Representative Workload Factors and Calculations

The following assumptions were used to calculate the number of customer service representatives necessary to staff a new Citywide 311 Program desk at the Portland Building. This analysis assumes that the existing City/County Information & Referral Program and its staff would continue to provide services over the phone. The Information & Referral Program will be incorporated into the Citywide 311 Program in FY 2019-20. As such, workload calculations focus on the additional staff capacity necessary to provide the enhanced levels of service described below.

Staff Shrinkage & Occupancy Levels

This analysis assumes a shrinkage rate of 45% based on the following deductions from available working hours:

- Recognized holidays: 10 days per year
- Personal holidays: 3 days per year
- Vacation: 16.5 days per year (5 yrs of service)
- Sick leave: 13 days per year
- Training: 4 days per year
- Paid breaks: 28.5 days per year (7.5 hours/week)
- Team and individual meetings: 9.5 days per year (2.5 hours/week)
- Program activities: 30.4 days per year (8 hours/week)

The analysis assumes a 95% occupancy rate. “Day” = 8-hour workday.

Anticipated Contact Volume

- Number of contacts per hour:** The City collects limited data on the number of walk-in contacts for the services to be provided by the Citywide 311 Program. In addition, the renovation of the Portland Building – including the creation of a public-facing customer service zone and changes to visitor access and security protocols – will increase walk-in contact volumes beyond what was experienced prior to renovations. This analysis assumes approximately 30 contacts with the customer service desk per hour, based on the following program volume estimates.

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Table 4. Contact Volume Assumptions

In-Person Customer Service Desk		
Service/Program	Assumed volume	Source
311 Community Info & Services	900 per month	I&R 2016-17 walk-in contact data
PP&R Customer Service ¹	1,000 per month	No data available; best guess
PBOT ¹	1,500 per month	Best guess based on available data
TPB Walk-in volume	3,000 per month	I&R Supervisor, 200% pre-renovation volume estimate
TOTAL 6,500 per month or approximately 30 in-person contacts per hour		

¹ The 311 Program focuses on intake, referral and resolution for common city service requests and reports. It will not eliminate the need for program specialists in Bureau programs.

Full Implementation (walk-in, phone and online; assumes incorporation of I&R)		
Service/Program	Assumed volume	Assumptions
311 Community Info & Services	40,000 per month	Existing I&R volume (9k) PLUS: 30% of non-emergency volume (11k); 30% of PBOT (8k); PP&R (5k) and allowance for additional services (7k). Equivalent to volume experienced by comparable cities.
Walk-in volume	6,000 per month	See FY 2019-20, above
TOTAL 46,000 per month or approximately 220 in-person contacts per hour		

- b. Time to resolve:** This analysis assumes an average contact handling time of 3 minutes or 180 seconds.
- c. Hours of Operation:** This analysis assumes operation from 8 a.m. to 6 p.m. on weekdays, excluding observed holidays, equal to 10 hours per day or 2,500 hours per year.

Performance Targets

This analysis assumes a performance target of 80% of in 20 seconds. Customer service best practices recommend an ‘average speed of answer’ of approximately 10% of average handling time (e.g. 10% of 180 seconds = 18 seconds). Slower answer times are correlated to reduced customer satisfaction. Faster answer times increase the number of agents needed while not increasing customer satisfaction significantly.

Calculation method

This analysis used the Erlang-C formula to estimate the number of customer service staff needed to provide targeted levels of service. The Erlang-C formula is commonly used to calculate the number of staff necessary to handle call volumes in a contact center environment, based on the number of calls, average amount of time to answer and handle each call, and desired performance targets.

Results

Based on the assumptions above, the Citywide 311 Program will need:

- In-person Customer Service Desk: **5 FTE** customer service staff to provide desired levels of service. For FY19-20, these 5 FTE will be made up of 311 Program staff as well as PP&R and PBOT program specialists.
- Full Implementation: **20 FTE** total customer service staff for phone, in-person, and online customer service, including existing I&R Specialists

EXHIBIT A

Staff Recruitment

This document assesses six recruitment options to staff the Citywide 311 Program in FY 2019-2020, based on the desire for a service-first, inclusive staff culture that builds on institutional knowledge while meeting the operational needs of the program. It then recommends a recruitment option for each anticipated position.

Recruitment Goals

The Citywide 311 Program should embody a people-first culture that provides an inclusive and welcoming experience. 311 Program staff should have the skills and knowledge to provide inclusive and effective customer service to community members and other customers. They should be able to establish and maintain positive relationships with diverse customers and demonstrate a commitment to providing information to resolve a customer’s need in a helpful manner. To advance equity, 311 Program staff should reflect Portland’s diverse community and provide an inclusive and welcoming experience. To achieve this goal, the City should work to recruit and hire diverse staff, including those who speak Spanish and other Safe Harbor Languages.

The Citywide 311 Program’s staff should be able to communicate accurate information about a broad array of City services, maintain confidentiality where indicated, and communicate information clearly and accurately. Staff should be able to use assigned systems and tools to intake and/or resolve a customer’s request or question on the first contact.

The staff recruitment process must meet the operational needs of the Citywide 311 Program and the City. Given the limited time between FY2019-20 budget allocations (July 1, 2019) and the scheduled opening of the Portland Building (December 16, 2019), the program should pursue recruitment options that can fulfill the above goals most expediently. In addition, the process must meet the requirements of Human Resources Administrative Rules as well as labor union contracts (for represented positions).

Assessment of Recruitment Options

Recruitment Type	Assessment against Goals		
	People-first, inclusive culture	Accurate information & services	Meets operational needs
External			
Open recruitment Open to all applicants, including applicants that are not currently City of Portland employees	+ Ability to hire for diversity and desired customer service knowledge, skills and abilities	- May not bring institutional knowledge + Potential to bring outside experience/expertise	- Longest time to hire + Largest potential applicant pool
Eligible list Recruitment from an eligible list of applicants, as developed from a previous recruitment process based on the assessment of specific knowledge, skills, abilities, licenses and other job-related qualifications for a position.	+ Ability to hire for diversity and desired KSAs but in more limited applicant pool	- May not bring institutional knowledge + Potential to bring outside experience/expertise	- Requires eligible list - Shorter time to hire compared to open recruit.
Internal			
Internal recruitment Open to applicants who are or have been temporary, limited duration, seasonal, or regular City employees within the timeframe specified on the announcement.	+ Ability to hire for diversity and desired KSAs but in more limited applicant pool	+ Can establish preference for knowledge/skills/expertise in key service areas + Internal applicants more likely to fulfill KSAs with limited training - Less likely to bring outside experience/expertise	- Shorter time to hire compared to open recruit. + Allows for recruitment of ‘willing’ staff + Avoids HR and union challenges posed by other internal options

EXHIBIT A

<p>Reclassification Reclassification of an existing position due to a significant and permanent change in job duties</p>	<ul style="list-style-type: none"> Assumes employee in existing position fulfills diversity goals and KSAs. 	<ul style="list-style-type: none"> + Can hire for institutional KSAs - Less likely to bring outside experience/expertise 	<ul style="list-style-type: none"> - May pose HR, union, morale or operational challenges
<p>Temporary appointment Used for meeting emergency, non-recurring, and short-term workloads needs of the City. However, such appointments do not carry “status” in the classification and are outside the civil service process and shall not be used to defeat the open and competitive procedures.</p>	<ul style="list-style-type: none"> Assumes employee in existing position fulfills diversity goals and KSAs. 	<ul style="list-style-type: none"> + Can hire for institutional KSAs - Less likely to bring outside experience/expertise 	<ul style="list-style-type: none"> - Not appropriate for long term needs + Quickest time to hire
<p>Matrix management Organizational structure where employees report to multiple supervisors for different components of their work. Successful execution of a matrix management structure requires clear roles, responsibilities and procedures to ensure cooperation and communication.</p>	<p><i>Similar to reclassification/ temporary appointment</i></p>	<p><i>Similar to reclassification/ temporary appointment</i></p>	<ul style="list-style-type: none"> - Likely to pose significant HR, union, morale or operational challenges

Recruitment Recommendations

Open Recruitment

- 311 Program Manager

Internal Recruitment

- Customer Service Specialists
- Administrative Specialist
- Data Analyst
- Continuous Improvement Coordinator

If an internal recruitment is unable to successfully fill positions with qualified staff, the program would move to a) eligible lists or b) open recruitment.

Reclassification (prior to FY 2020-21)

- Information & Referral Specialists

The 311 Program has requested classification analyses for the Customer Service Representative I and II positions. The Program intends to request the reclassification of existing Information & Referral Specialists into these classifications as staff take on expanded 311 responsibilities.

Recruitment timeline

The 311 Program should hire staff over the three-year implementation period. Additional staff may be needed in subsequent years, if the roles and responsibilities of the program expand or as use increases.

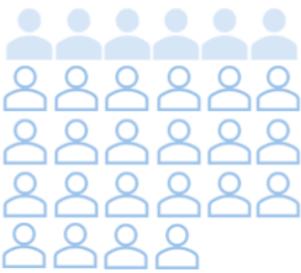
Training and Professional Development

To successfully launch a citywide 311 Program, Portland will need to ensure program staff receive:

- Training and development programs in both the hard and soft skills necessary to excel, including:
 - Knowledge of the City’s programs and services
 - Customer service skills, such as cross cultural and inclusive communication; resolution and de-escalation of difficult situations; and applicable established policies and procedures
 - Any software tools or business applications necessary to perform their work
 - Requirements for confidential and restricted customer information; cash handling and PCI compliance
- Opportunities for professional development and to continuously improve the operations of the Program and City.

EXHIBIT A

Implementation Timeline

	Annual Focus	FTE	Cost*	Level of Service
FY 2019-20	311 Foundation & In Person Customer Service Create a One City Customer Service Center at The Portland Building that provides citywide information, referral and resolution services as well as reception and visitor assistance.	5.5 FTE Program Manager Customer Service Reps (2) Admin Specialist (0.5) Data Analyst Continuous Impr. Coordinator 	\$662,000 + carryover	% of Total 311 Services  New Channels  Expanded Channels 
	UNDERWAY Portland.gov Service Directory Replace PortlandOregon.gov with a One City, service-focused website.	Incorporate Information & Referral Program (6 FTE) 		
FY 2020-21	Software Tools In coordination with BTS, implement a solution to replace online service forms (TrackIt) and log contacts with community members and intake, route, and track the status of requests.	+2.0 FTE Customer Service Reps (1) Applications Analyst II (1) 	+ \$130,000 ongoing <i>Assumes alignment w/BTS-acquired webform & service desk solutions</i>	% of Total 311 Services  Expanded Channels 
	Onboarding of Additional Services			
FY 2021-22	Establish 311 Contact Center Create a 311 Contact Center, increase capacity and enhance resolution capabilities. Communicate and market the program.	+7.5 FTE Customer Service Reps (5) Supervisor (1) Admin Specialist (0.5) Comm. & Outreach Specialist 	+ \$150,000 one-time + \$400,000 ongoing	% of Total 311 Services  New Channels  Public Info Campaign 
	<i>FTE and budget could be reallocated from programs benefiting from 311.</i>			
FY 2022-23+	Expand Service Delivery Continue to increase capacity, enhance resolution capabilities, and market the program.	+7.0 FTE Customer Service Reps (7) 	+ \$340,000 ongoing	% of Total 311 Services 
	<i>FTE and budget could be reallocated from programs benefiting from 311.</i>			
<div style="border: 1px dashed blue; border-radius: 15px; padding: 10px;"> <p>Full Citywide 311 Program</p> <p>311 provides a first-stop for community questions and requests, whether someone is contacting the City online, over the phone, or in-person.</p> <p style="text-align: center;">28.0 FTE (total)</p> <p style="text-align: center;"></p> <p style="text-align: center;">\$3 million ongoing</p> <p style="text-align: center;">% of Total 311 Services  Channels </p> </div>				

* FTE and costs are per year and additive; All costs are estimated, 2019 dollars.

EXHIBIT A

311 Program Budget

Projected FTE and Budget

Fully implementing the 311 Program envisioned in this plan will require 28.0 FTE and a total program budget of approximately \$3.15 million in FY 2022-23, see Tables 4 through 6.

These personnel, expenditure, and resource projections are exclusive of future Council decisions that may impact the 311 Program's scope, personnel requirements, and financial resources. Such decision points might include:

1. Implementation of the Customer Service Resource Study's recommendations, which will provide service-specific details on how to leverage existing City resources, see page 12.
2. Fully transferring major customer service functions not currently included in the 311 Program's scope, specifically the Portland Water Bureau's, Revenue Division's, PBOT Dispatch, and Permit Center's services, staff, and resources.
3. Expansion of services beyond Monday through Friday from 8 a.m. to 5 p.m.
4. One-time and ongoing costs for contact center management/service desk solution deployment to other bureaus.
5. Changes to the Intergovernmental Agreement with Multnomah County regarding the scope or cost-sharing model for the City/County Information & Referral Program.
6. Development of a 311 Call Center as a back-up facility for the Bureau of Emergency Communications, which would greatly increase the costs of building improvements.

Potential Benefits and Savings

A primary purpose of the 311 Program is to improve the level of service the City provides to its community members and customers. Increased levels of service can be achieved by reducing the wait times and transfers experienced by community members contacting the City and by freeing up staff capacity within Bureaus to assess and respond to community needs.

Implementing the 311 Program could also result in cost savings by:

- Centralizing & streamlining customer service
- Reducing non-emergency call volumes
- Eliminating phone lines & redundant software
- Moving customer requests to lower-cost channels
- Reducing staff time spent processing contacts & requests
- Making services more efficient

The program could generate new revenues through expanded regional service partnerships.

EXHIBIT A

Table 5. Projected Program Personnel

Class	Title	Salary Range FY 2019-20		Adopted FY 2019-20		Future Personnel					
						FY 2020-21 <i>high confidence</i>		FY 2021-22 <i>moderate confidence</i>		FY 2022-23 <i>low confidence</i>	
						No.	Amount	No.	Amount	No.	Amount
30003002	Administrative Specialist I	45,802	68,682	0.0	0	0.0	0	1.0	55,089	1.0	55,089
30003007	Analyst II	63,336	105,373	0.0	0	1.0	84,354	1.0	84,354	1.0	84,354
30003028	Coordinator II	53,290	98,800	0.0	0	1.0	76,045	2.0	152,090	2.0	152,090
30000017	Customer Accounts Specialist I	41,746	60,216	2.0	70,169	7.0	327,453	11.0	514,569	16.0	748,464
30000018	Customer Accounts Specialist II	49,774	65,957	0.0	0	1.0	54,101	2.0	108,202	4.0	216,404
30000016	Information & Referral Specialist	37,461	53,789	4.9	215,155	0.0	0	0.0	0	0.0	0
30003081	Manager I	80,205	140,338	1.0	110,271	1.0	110,271	1.0	110,271	1.0	110,271
30003103	Supervisor I	63,336	105,373	1.0	85,184	1.0	85,184	2.0	170,368	2.0	170,368
30000203	Application Analyst (BTS)	n/a	n/a	0.0	0	1.0	<i>see IMS</i>	1.0	<i>see IMS</i>	1.0	<i>see IMS</i>
TOTAL FULL-TIME POSITIONS				8.9	480,779	13.0	737,408	21.0	1,194,943	28.0	1,537,040
30003002	Administrative Specialist I	45,802	68,682	0.5	41,317	0.5	55,089	0	0	0	0
TOTAL PART-TIME POSITIONS				0.5	41,317	0.5	55,089	0	0	0	0
30003007	Analyst II	63,336	105,373	1	84,354	0	0	0	0	0	0
30003028	Coordinator II	53,290	98,800	1	57,034	0	0	0	0	0	0
TOTAL LIMITED-TERM POSITIONS				2	141,388	0	0	0	0	0	0
GRAND TOTAL (Information & Referral)				5.9	300,339	0	0	0	0	0	0
GRAND TOTAL (311)				5.5	363,145	13.5	792,497	21.0	1,194,943	28.0	1,537,040
Annual change (year over year)				n/a	n/a	2.1	129,013	7.5	402,446	7.0	342,097

Notes:

All costs are current dollars for FY 2019-20.

For FY2019-20, the Administrative Specialist I, Customer Accounts Specialist I, and Coordinator II assumed start dates of 10/1/19. All other positions assumed a start date of 7/1/19.

The FY2019-20 Adopted Budget included separate program offers for the Information & Referral Program and 311 Program. The Future Personnel columns above show these two programs combined beginning in FY2020-21.

EXHIBIT A

Table 6. Projected Program Expenditures

	Adopted FY 2019-20 (311 only)	Future Estimates		
		FY 2020-21 <i>high confidence</i>	FY 2021-22 <i>moderate confidence</i>	FY 2022-23 <i>low confidence</i>
311 Program Requirements				
Personnel Services	579,560	1,376,055	1,898,637	2,453,201
External Materials and Services	8,295	150,250	211,500	72,000
Internal Materials and Services	74,250	410,500	523,000	628,000
Total Expenditures - 311	662,105	1,936,805	2,633,137	3,153,201
Total Expenditures – I&R	704,996	<i>Included in 311</i>	<i>Included in 311</i>	<i>Included in 311</i>
GRAND TOTAL COMBINED	1,367,101	1,936,805	2,633,137	3,153,201
Increase over FY 2019-20 Adopted Budget	0	569,703	1,266,036	1,786,100

Notes:

All costs are current dollars for FY 2019-20.

For FY 2020-21 and on, the Total Expenditures includes program requirements for a combined 311 and I&R Program.

External materials and services includes personnel-related EMS; \$30,000 per year for PTE services; a one-time \$100,000 to configure and deploy a contact management/service desk solution; and a one-time \$150,000 for tenant improvements and other costs to establish a call center in FY 2021-22.

Internal materials and services includes ongoing costs associated with program personnel (including, but not limited to, facility lease and AVAYA, Language Line, and service desk licenses). It also includes the annual rate with General Fund Overhead for a BTS-Assigned Application Analyst II (\$208,000) to be assigned to support the 311 Program.

Table 7. Projected Program Resources

	Adopted FY 2019-20	Future Estimates		
		FY 2020-21 <i>high confidence</i>	FY 2021-22 <i>moderate confidence</i>	FY 2022-23 <i>low confidence</i>
311 / I&R Program Resources				
General Fund one-time	251,708	100,000	150,000	0
TOTAL GENERAL FUND ONE-TIME	251,708	100,000	150,000	0
GF discretionary	309,914	607,611	963,761	1,208,191
GF ongoing - overhead	349,479	685,178	1,086,795	1,362,429
TOTAL GENERAL FUND ONGOING	659,393	1,292,789	2,050,556	2,570,620
IA with Multnomah County (I&R)	352,498	352,498	352,498	352,498
IA with TPB tenants	103,502	191,517	230,083	230,083
TOTAL INTERAGENCY ONGOING	456,000	544,015	582,581	582,581
GRAND TOTAL ONGOING	1,115,393	1,836,805	2,633,137	3,153,201
Increase over currently appropriated General Fund ongoing resources	0	633,396	1,391,163	1,911,227

Notes:

All costs are current dollars for FY 2019-20.