



CITY OF  
**PORTLAND, OREGON**

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To: Commissioner Fritz  
From: The Customer Service Advisory Committee (CSAC)  
Date: January 4, 2012  
Re: Annual Customer Service Advisory Committee report

The Customer Service Advisory Committee (CSAC) is presenting their 2009-2011 report to Council on January 18, 2011 (exhibit 1).

In 2005, Bureau Innovation Project #7 (BIP 7) was adopted with the goal of developing recommendations for improving City-wide customer service policies and procedures. In order to continually improve customer service in the City, the BIP 7 recommended creation of a Customer Service Advisory Committee (CSAC) to assist bureaus in their implementation of BIP 7 recommendations. The Customer Service Advisory Committee (CSAC) was created in September 2006 to assist all City bureaus in working collaboratively with their employees to improve customer service.

The report provides an assessment of bureaus' customer service efforts over the past two years. The report also highlights customer service best practices used by City bureaus. No requests for council action are being made but some general recommendations for citywide direction regarding customer service are included in the report.

**TO THE COUNCIL:**

The Commissioner accepts the report of the CSAC and

**RECOMMENDS:**

that the Council accept the report.

## 2009-11 City of Portland Customer Service Status Report Executive Summary

This is the third report of the Customer Service Advisory Committee (CSAC). This report covers two fiscal years- 2009-10 and 2010-11.

City Council, as part of adopting the recommendations of Bureau Innovation Project #7, passed Resolution No. 36438 establishing the CSAC on **September 13, 2006**. Since its creation, the CSAC has been working with bureaus to improve customer service across city bureaus by focusing on 3 key areas:

1. Incorporating customer service elements into bureaus' mission, goals and values statements as well as into strategic plans.
2. Implementing and improving customer service feedback mechanisms.
3. Developing customer service competencies in the workforce through bureaus' hiring, performance evaluations, and training.

Every year since the Committee's creation, bureaus have been asked to give an annual update on their customer service efforts as part of their budget submissions. This report summarizes and highlights bureau achievements related to customer service. The Committee has also created a website ([www.portlandonline.com/csac](http://www.portlandonline.com/csac)) that serves primarily as a "toolkit" where we showcase examples of outstanding customer service efforts so that bureaus can learn from each other.

It is important to note, this status report is not an attempt to evaluate the quality of the bureau's customer service. The CSAC only collects information on bureau efforts to solicit and document customer assessments of service delivery.

Overall, this year's report shows continued progress in bureau efforts to improve customer service, but also shows the rate of improvement has slowed due in part to budget constraints. The CSAC has been encouraged by bureau's efforts to incorporate customer service into mission, values and goals materials. Several bureaus also developed comprehensive customer service related strategic plans. New and enhanced customer feedback mechanisms were implemented by many bureaus. Many bureaus also moved to make customer service a significant component of workforce development.

It is important to note, fiscal constraints over the last few years have had an impact on customer service improvement efforts. It has been particularly difficult for smaller bureaus to allocate scarce financial and personnel resources to training and surveying. Thus, as with other affected City programs affected by tight budgets and staff reductions, progress has slowed. The good news is that there's an increasing array of online externally hosted affordable survey tools available online, and we are encouraging bureaus to make the best they can of lower cost measurement options. Cuts to budgets have also frequently resulted in staffing reductions which have had a negative impact on frontline services. Training budgets have been minimal or non-existent for many bureaus and all bureaus would benefit from greater citywide customer service training opportunities.

The CSAC continues to note a significant efficiency opportunity in the area of Customer Service. At present the City lacks a central customer relationship management database. Each bureau manages customer relationship management database. Each bureau manages customer relationships and service requests independently. This has resulted in significant duplication of effort and lost opportunities. As resources allow, the Committee sees value in Council giving consideration to formally researching the advantages and disadvantages of a Citywide CRM

(Customer Relationship Management) system, a tool which is in common use in many private and public sector organizations.

Finally, we hope Council continues to be supportive of bureau's investments in training, practices and tools for systematically gathering customer requests/input and measuring customer satisfaction with service delivery.

**A few highlights from the past couple of year's bureau efforts that you will find in the attached report:**

### **Incorporating Customer Service into Mission/Goals/Values and Strategic Plans**

Several bureaus including **Water, Parks & Recreation, OMF** and the **Revenue Bureau** have continued with their customer service focused strategic planning efforts. Several other bureaus including the **Bureau of Environmental Services, Bureau of Planning and Sustainability, Portland Bureau of Emergency Management, Fire Bureau, and Portland Housing Bureau** have gone through strategic planning efforts in the past couple of years, and all have done a good job of including customer service as a key element. For example; **BPS** did significant stakeholder surveying as part of the development process and **PBEM** implemented a new community outreach plan as part of theirs. Many bureaus continue working to focus on customer service in specific projects though we have seen less of these types of efforts than in the previous couple of years. Some examples are the **Water Bureau's Water Line** which gives customers a single point of contact for customers; **Parks & Recreation's ParkScan** web tool that allows parks users to easily report maintenance needs or other concerns to Parks staff; and the **Revenue** and **Water Bureau's** implementation of online payment options for their customers.

### **Surveying Customers**

Most bureaus have used specific formal customer survey tools over the past few years-- **Water, Parks, BTS** and the **City Attorney's** office are some of the best examples of bureaus that continued with their surveying efforts in recent years. Several bureaus, including **OMF, City Attorney** and **BTS** have specifically employed surveying recommendations from the committee. In the past couple of years, a few bureaus have added new customer feedback tools such as the **Auditor's Fraud Alert Line, Government Relation's** customer survey as well as **Bureau of Environmental Services, Fire, Police** and **PHB's** surveying as part of their strategic planning efforts.

### **Workforce Development**

Almost all bureaus have incorporated customer service into their recruitment and performance evaluations. Training varies widely with smaller bureaus generally having more difficulty making customer service training available to their staff. A few bureaus such as **Water, Parks** and **Revenue** continue to do significant customer service focused training within their bureaus. **OMF** completed their Succession Planning effort which includes strategies for recruitment and employee development. All bureaus, especially those not mentioned above, would benefit by greater citywide customer service training opportunities.

## **2009-11 City of Portland Customer Service Improvement Efforts Status Report**

### **Bureau of Planning Sustainability**

**Mission/Goals/Strategic Plans** – After a significant reorganization, the newly formed Bureau of Planning and Sustainability went through a strategic planning effort to create their 2011-13 Strategic Plan. The plan development included significant stakeholder surveying. Three of BPS' 10 stated values are directly applicable to customer service:

- Collaborative partnerships,
- Responsive customer service
- Advance policy, programs, plans, regulations and urban design that foster both innovation and practical solutions.

BPS is still in the process of discussing stated values to further shape a comprehensive bureau-wide approach to customer service. They are also working on a Public Involvement Strategy which will include a full chapter on customer service.

Many individual BPS project efforts emphasize outreach and customer service in specific ways:

- Throughout programs, outreach/educational documents are translated into multiple languages for non-native English speakers; they also use interpreters at community events to make them accessible.
- In their District Liaison program, staff works with community groups, businesses and individuals through outreach and engagement activities.
- Their Youth Planning Program has worked to integrate youth into city planning efforts by producing a youth involvement manual, a new website, and "co-host tours".
- The Portland Plan has involved a significant amount of outreach activities.
- The Solid Waste and Recycling group is filling its customer service lead position and developing and implementing a new complaint database tool. They have also developed specific customer service policies and procedures including response time goals, tracking inquiries, how to handle difficult calls, etc.

**Surveying** – Several individual BPS programs use ongoing customer surveys. The Green Building Hotline sends out a customer service survey to callers and the information is collected and compiled into an annual report. The Business Sustainability Program (BEST) solicited feedback and compiled survey results from businesses. The information was used to redesign the bureau's programs that offers services and resources to help businesses "Go Green". BPS also uses surveys to track customer satisfaction on specific projects such as the yard debris roll carts and Fix-it Fair events.

The Solid Waste and Recycling group receives about 1275 inquiries a month and is working on a method to survey customers on the performance of customer service staff.

**Workforce Development** – Customer service is a key element in recruitment and hiring for most workgroup supervisors. All BPS employees' annual work plans and performance evaluations also include customer service. Staff in the Solid Waste and Recycling and the Operations/Admin groups are being cross-trained to help each other and to provide more efficient customer service delivery.

### **Children's Levy**

**Mission/Goals/Strategic Plans** – The Children's Levy Office has devised an effective Customer Service Practices document. It does a good job of identifying the Office's different customers, and some practical ways that they can ensure accessibility, accuracy, transparency and availability of information.

**Surveying** – There is no existing survey of customers. Their primary customers are grantees that they give money and have direct contact with individual office staff.

**Workforce Development** – This is a very small office with limited training resources. There are no specific efforts to develop customer service competencies. They would benefit from the City making more low-cost trainings available.

### **City Attorney**

**Mission** – The City Attorney's Office's Mission and Goals statements have good specific customer service components. They also have some very specific written customer service expectations in their work plans, such as 24-hour response times, no automated phone messages, sufficient front desk coverage, and training for their front desk staff. Their 2008-9 Work Plan added "provide excellent customer service" as an explicit office goal.

**Surveying** – They conduct a customer service survey every two years. The most recent was completed in March 2010. The survey is an excellent example of a simple, yet effective customer survey. An analysis was conducted comparing results from the last 3 surveys – 2006, 2008 and 2010. Though the results have changed over the years, overall, they have been positive.

**Workforce Development** – There are a few new items in this report. The City Attorney's Office is in their second year of a reorganization into "practice groups" which let the office take advantage of various staff expertise in the office and provide opportunities to share knowledge. They have also recently implemented a Practice Management software system that provides a base of information accessible to all staff to look up information and facilitate a consistent response to inquiries. Their 2010 annual employee performance evaluation process included goals on how employees can improve customer service. They also recently implemented a revised new employee orientation

process. Beginning in 2011, recruitment efforts will include some new customer service elements in the interview process.

## **City Auditor**

**Mission/Goals/Strategic Plans** – There have been no changes to the Auditor’s Mission, Goals, etc. Several functions of the Auditor’s Office specifically work to improve Citywide customer service: Audit Services identifies ways to improve City services; the Ombudsman resolves complaints about City services; Independent Police Review (IPR) investigates allegations of police misconduct; and the Hearings Office offers an impartial avenue to appeal City actions.

**Surveying** – To more effectively solicit feedback and concerns from the public, the Auditor initiated a Fraud Alert Line – (1-866-342-4148, <http://www.portlandfraudalert.com>). The Fraud Alert Line allows the public and City employees to confidentially report complaints related to the City’s provision of services either over the phone or online. In addition, IPR, Ombudsman and Audit Services continue their annual surveying efforts, all of which have been highlighted in previous reports. Audit Services’ continues to survey the auditee after conducting audits, using the results to examine and validate its processes. IPR uses its survey results to modify intake process and to improve communications with complainants.

**Workforce Development** – As an office made up of several small programs, a major training initiative bureau-wide is difficult. However, the office encourages staff to participate in customer service-related trainings offered by the City. Several staff participated in a training conducted by Project Respond, entitled “Assisting People with Mental Health Issues”. The Auditor’s office would benefit from expanded Citywide training opportunities. In addition, when interviewing prospective employees, the Auditor asks candidates about their experience in customer service and for examples of how they practiced high-quality customer service in past positions.

## **Office of Community Technology**

**Mission/Goals/Strategic Plans** – The Office engaged in a strategic planning process which resulted in an updated Strategic Plan. The Strategic Plan has a significant focus on internal and external customer service. A new item of interest in this year’s report is the office protocols which address office coverage, phone coverage and cable complaint coverage. These protocols are a nice example of specific bureau policies designed to make sure customers have access to service in a timely manner.

**Surveying** – This small bureau does not have a general customer survey for their customers; however, they are involved in a great deal of public outreach and often use formal customer input tools. A couple of examples are the Community Communications Technology Needs Ascertainment (Your Voice Our Communications Technology) and

outreach related to the City's development of a Broadband Strategic Plan. For the Technology Needs Ascertainment, the Mt Hood Cable Regulatory Commission contracted with CBG Communications to do extensive surveying, focus groups and interviews to determine current levels of use of communications technology, immediate and long-term technology needs, as well as views about the government's role in this area. The Broadband Strategic Planning process included a kick-off event with over 100 participants in City Hall and five workgroups with over 50 participants that actually developed the draft plan. Staff conducted extensive outreach to review the draft plan. The plan was adopted by Council in September 2011. A work plan for implementation is under development.

**Workforce Development** – The Office of Community Technology struggles to provide customer service training to its staff since they are a small office. Staff are encouraged to take city-sponsored customer service training. Three staff participated in some customer service trainings but would like additional training if it were financially feasible. The office would benefit from the City making more low-cost customer service trainings available. The office uses staff meetings and online learning as an opportunity to share customer service information. The office includes customer service as a key element in hiring and performance evaluations.

## **Bureau of Development Services**

**Mission/Goals/Strategic Plans** – BDS's mission statement includes strong customer service elements. Over the last several years, BDS has successfully integrated a customer service ethic into its culture. However, recent financial challenges required a reduction in 2009 and 2010 that significantly impacted their customer service. Until recently, BDS did not have sufficient staff to meet workload, and service levels fell significantly. To help remedy this situation, City Council approved BDS' proposal to use improved permit revenues to add 13 new positions in its 2011-12 budget request. This has allowed BDS to improve service levels in the areas of residential inspections, commercial inspections, housing inspections and nuisance property cleanups. City Council also approved some one-time General Fund support to three positions in Neighborhood Inspections, an essential neighborhood livability program, that had been under-staffed. BDS is also working on procuring a new automated permitting system, which will improve its customer service provision. This new project, ITAP (Information Technology Advancement Project), was given Council approval to proceed in November 2010.

**Surveying** – For many years, BDS has given mail-in surveys to land use customers in its permit center. In addition, from 2002-2008 the bureau conducted large-scale customer surveys by telephone contacts with outside vendors. Due to budget cuts, BDS has not been able to conduct a customer survey since 2008, but the bureau hopes to resume these again in the future.

**Workforce Development** – As highlighted in previous reports, BDS implemented an extensive custom training for staff in 2003. This Customer Service Solutions training is

still given to new employees; current employees receive additional training as needed and within the bureau's financial means. The bureau's Outreach Committee previously developed a recruitment plan, which is still utilized, that places emphasis on candidates with customer service experience, communication and problem-solving skills, and cultural competency.

## **Emergency Communications**

**Mission/Goals/Strategic Plans** – BOEC's mission is to "serve the community by providing the vital link to the proper emergency service response using the most efficient operating systems available". The bureau has adopted the citywide Staff Workplace Aspirations Needed to Achieve Customer Service Expectations document and the Customer Service Expectations document. BOEC also has a Code of Ethics which addresses individual customer service performance expectations.

BOEC has recently focused on community outreach in an effort to better understand customer expectations. They partnered with the Office of Neighborhood Involvement (ONI) and Portland Police to attend neighborhood association meetings to help learn ways to make 9-1-1 more accessible for community members. Part of this strategic outreach has been involvement with the SaferPDX project, sponsored in part by the Bazelon Center for Mental Health Law, a three year study to help understand ways in which the city of Portland can minimize unnecessary contact between law enforcement and people in mental health crisis. Many areas of opportunity have been identified to improve our training and communication between agencies, specifically around mental healthcare issues. In addition, they are investigating different procedures to help streamline the call for the person in crisis so that they can get connected with the Mental Health Crisis Line.

**Surveying** – BOEC does not conduct any formal community customer service surveys outside of an online Community Feedback form on their website. The Auditor's Annual Community Survey includes some questions that assess community perception of 9-1-1 services. The 2010 Community Survey Report said that 80% of residents felt positively about 9-1-1 services.

**Workforce Development** - The 9-1-1 Operations process of performance reviews has undergone a significant revision with a focus on providing respectful customer service delivery. Employees and supervisors review calls monthly to document opportunities for improvement in call taking and customer service skills. The bureau has seen a significant decrease in complaints.

In the recruitment process for all positions, customer service expectations are communicated in the job class specifications, job announcements and during the interview process. New employee orientation and training includes; daily evaluations which critique key elements of customer service delivery, an explanation of the



expectations of the BOEC Standard of Conduct, Code of Ethics, Customer Service Expectations and Staff Workplace Aspirations.

### **Portland Bureau of Emergency Management**

**Mission/Goals/Strategic Plans** – In support of PBEM's FY 2011-2013 strategic plan – each program area has adopted specific work plans that incorporate customer service components. Overall strategic goals that advance and promote PBEM's service to the community include: integrating emergency management into broader community goals and investment strategies; adopting a "whole community" approach to emergency management that promotes equitable access and integration of historically underserved and at-risk populations in emergency planning processes and prompting household action by increasing the visibility of actual preparedness and mitigation activities. In addition, PBEM completed and began implementing a community outreach plan in 2011 that explores ways to reach our underserved and vulnerable populations.

In 2010 PBEM restructured its Community Emergency Services section to improve community outreach efforts. They established a PIO position to promote more public information and outreach. In January 2011, the PIO developed a Public Information and Outreach Plan. PBEM also created a Customer Service Committee to review customer service practices and make recommendations. The primary focus so far has been on the Outreach Plan, though they have also worked on the website and new ways for the public to reach the office. They have also focused on establishing good relationships with the neighborhood coalition and City Disability Committee to ensure plans are reviewed by the city's different populations. They have also collaborated extensively with the Neighborhood Emergency Teams Steering Committee to improve support to this important partner.

**Surveying** – PBEM solicits comments/feedback from the public and targeted groups on plans coordinated by the bureau. Comments and feedback received through the website/TrackIT are shared with appropriate staff members and incorporated in revised plan updates. PBEM has implemented an online customer survey and will begin to compile, and post to our website, a list of FAQs in response to the survey or received from public inquiries. We will soon migrate to a new website that will be more conducive to social media outreach and the posting of new video content for mass consumption. Pending the launch of the new portlandonline refresh, a new survey tool will be made available on the website to solicit input from the public. Additionally, PBEM conducts evaluations of all training and exercises conducted by the bureau. These evaluations help inform and improve future training/exercise events.

They used an internet based survey recently of the NET team members to find ways to better serve the NETs. The survey went live May 2011 and data is currently being collected and collated.

**Workforce Development** – PBEM would benefit from greater ongoing citywide customer service training opportunities. By the end of this year PBEM will adopt customer service measures as part of the annual performance evaluation process.

## **Bureau of Environmental Services**

**Mission/Goals/Strategic Plans** – BES has many documents that include customer service elements as key components. They have recently updated their Strategic Plan which includes a key value of providing responsive, cost effective and reliable services to our customers and equity as one of their 5 guiding principles. The bureau has a Committee for Workplace Excellence and a Management Excellence Program; both are examples of tools to institutionalize customer service values in an organization.

**Surveying** – No general bureau-wide customer service survey has been conducted since 2005 although there are plans to survey again. The bureau does a lot of surveying related to individual projects and programs. Many of these surveys contain customer service elements. They recently adopted a protocol for selecting which projects should be surveyed. In 2010, the bureau contracted with Campbell DeLong to conduct four public awareness focus groups. These focus groups were helpful to determine which environmental issues were of greatest concern to constituents and to better gauge public perception of the bureau and the services it provides. Some key conclusions from this study were that residents want improved water quality in area rivers and streams and the bureau needs to do a better job of communicating accomplishments in this area by keeping communication simple and focused and needs to focus this communication on results not tasks.

**Workforce Development** – Hiring processes and performance evaluations contain customer service elements. Both DCTU and COPPEA performance review documents have a section evaluating interpersonal/customer service skills, and customer service questions are included in formal interviews. The Management Excellence Program includes specific customer service concepts. There is no indication of other customer service related trainings for non-managers.

## **Fire & Police Disability & Retirement**

**Mission/Goals/Strategic Plans** – There is no explicit mention of customer service in FPDR's current mission statement. Some strategic efforts mentioned relate to customer service, including the migration of their database to ensure continuity of operations and better information safeguards. They are also working on improving communications through the development of informational tools, enhanced web presence and more feedback mechanisms. Existing performance measures include:

- Satisfaction among retirement workshop attendees
- Accuracy of recent pension estimates compared to actual retirement benefits
- Timeliness of pension estimates

- Timeliness of disability claim decisions

In 2009 they conducted some stakeholder/community building forums with staff, Fire and police members and other stakeholders. They also used a consultant to help them with some “Community Conversations” with stakeholders which has helped them establish effective performance goals.

**Surveying** – In 2010, a survey was distributed in their quarterly newsletter. Response rates were lower than expected so they are working on a point-of-service survey that will be distributed with pension estimates and retirement paperwork. FPDR started using a brief pension estimate point-of-service survey accessible to members through their website. They also started giving retiring members a brief survey on their satisfaction with the retirement process. They haven’t been many retirements since but they are expecting a rush in the summer of 2011 which will give them a chance to try out this new tool.

**Workforce Development** – FPDR has only hired one person in the last couple of years into a service position. They do performance reviews of the pension coordinator position which include reviewing customer service data. There are no formal customer training efforts at this time.

## **Portland Fire & Rescue**

**Mission/Goals/Strategic Plans** –Portland Fire & Rescue’s Mission, Vision and Principles statement includes two customer service principles: “We are responsive to our customers”, and “We are good neighbors”. On November 17, 2010 City Council adopted the bureau’s 2010-15 Strategic Plan. Improving customer service is a key element of this plan, and PF&R’s Annual Business Plan ensures contents of the Strategic Plan are carried out. They worked with a strategic planning consultant – AKT, and many internal and external stakeholders in developing this plan. Of the 18 goals identified, four (Goals 1, 2, 8 and 9) specifically pertain to customer service enhancements. **Goal 1** is to ensure effective triage and dispatch of 9-1-1 calls. **Goal 2** is to build new and strengthen existing relationships with regional partners. **Goal 8** is to enhance PF&R’s business model to increase customer responsiveness. Goal 8 is particularly relevant with some very specific customer service strategies:

- Administer a customer survey to evaluate the user-friendliness of online services.
- Survey customers about desired online services/features
- Redesign website based on customer feedback
- Randomly sample customers who have used services to determine their level of satisfaction with their experience.
- Develop a business solution to accept online payment for services.
- Develop a solution for processing online permits.
- Redesign billing statements to be more customer friendly.
- Evaluate accessibility of facilities.

**Goal 9** is to improve fire code enforcement inspections to better meet customers' demands for consistent code application. This effort includes surveying customers regularly to measure satisfaction.

**Surveying** – The Auditor's 2009 Community Survey gave the Fire Bureau the highest satisfaction rating of any City bureau! The Auditor will be conducting this survey again in 2011. The recently completed strategic planning process included extensive customer surveying through mailed and online surveys as well as focus groups. (External & Internal Surveys Summary Report online at

<http://www.portlandonline.com/fire/index.cfm?c=25923&a=301765>) Customer groups surveyed included those that had made run calls, permit customers, those who were subject to code enforcement and social media "friends". 1838 invitations were sent and an electronic "Survey Monkey" survey was used. About 350 responses were received in total and a few of the significant issues that emerged relating to customer service were:

- Increased focus on community outreach to improve relationships with external customers.
- Diversity development efforts in recruitment.
- Ensure code enforcement is educational, not punitive and applied consistently.
- Increase/maintain stations, apparatus and staffing levels.

**Workforce Development** – Two of the Strategic Plan goals (Goals 14 and 15) specifically relate to customer service workforce development. **Goal 14** – Respond to Increased Cultural Changes and Social Demands, and **Goal 15** – Improve Firefighter Professional Development. Specific strategies include developing a survey to measure success in cultural competency and customer service and conducting an annual employee and public survey to identify, develop, and deliver relevant training to employees. Ongoing training blocks are conducted for staff on a monthly basis. The bureau has a full time recruiter who has focused new methods to reach underrepresented populations and increase the bureau's use of social media. The bureau has an extensive hiring process that includes customer-service related video test questions and in-person interview questions related to customer service. No information was provided regarding formal performance evaluations.

## **Government Relations**

**Mission/Goals/Strategic Plans** – The office's customers are City bureaus, elected officials and other City staff. Their current mission statement does not make explicit reference to customer service though they indicate in their report that customer service is an assumed core value within their office.

**Surveying** – The office conducted a customer service survey of the city bureaus in 2011 to evaluate the office's customer relations efforts. The response rate was good and they will be discussing the survey results at an upcoming staff retreat at the end of the year.

**Workforce Development** – The Director performs extensive annual reviews with each employee and encourages them to seek professional development to advance career goals. The Director also asks for a self-evaluation from employees. Employees are encouraged to attend training classes offered by the City and outside vendors. More citywide training offerings may be helpful to assist in getting staff of this small office more opportunities.

## **Portland Housing Bureau**

**Mission/Goals/Strategic Plans** – The Portland Housing Bureau conducted an extensive strategic planning process which resulted in a 2011-13 Strategic Plan. PHB customers include both persons with unmet affordable housing needs and local agencies, non-profits, and developers with whom PHB partners. The plan's mission, goals, and values reflect customer input and prioritization. The plan's implementation process itself contains regular opportunities for feedback and possible adjustments as well as strategic plan priorities such as "set and meet the highest standards for customer service and regulatory compliance."

PHB also developed specific strategies within a Strategic Plan Implementation Plan, many which address customer service. Throughout the implementation process the bureau will convene the Portland Housing Advisory Commission as an advisory group.

The following Goals or Strategies from the Strategic Plan address customer service:

- **Goal 2.C** – Increase participation by minority-owned and economically-disadvantaged firms.
- **Goal 4.B** – Establish and meet highest standards for customer service and regulatory compliance.
- **Goal 4.C** – Provide the community with clear, consistent, reliable data on Portland's housing needs and trends and on the performance of PHB programs.
- **Goal 4.E** – Ensure a wide range of perspectives to inform PHB's agenda, decision-making and policy-setting.

Once the Strategic Plan is finalized, PHB will develop a detailed implementation plan. Through this process the bureau helped convene the Portland Housing Advisory Commission as an advisory group during the transition.

**Surveying** – As part of the strategic planning process, the bureau conducted extensive community outreach in the form of a survey of Portlanders-at-large, community partners as well as an internal survey of bureau employees. (Survey findings online at [http://www.slideshare.net/PortlandHousingBureau/initial-findings-from-community-survey-on-housing-needs?from=ss\\_embed](http://www.slideshare.net/PortlandHousingBureau/initial-findings-from-community-survey-on-housing-needs?from=ss_embed)) PHB also convened a community forum and facilitated focus groups with key stakeholders. (results at <http://www.portlandonline.com/phb/index.cfm?c=49574&a=319443> and <http://www.portlandonline.com/phb/index.cfm?c=49574&a=319893> )

As far as ongoing customer surveying, the bureau has plans to evaluate customer service performance and responsiveness annually through surveys and other performance management tools.

**Workforce Development** – PHB uses customer service as a key element in recruitment, hiring and evaluation. Each member of the staff is held accountable to the bureau's "Business Operations Expectations" which sets a standard for high quality bureau customer service. Each member is evaluated on customer service competency during an annual review. A new element of the bureau's diversity development and cross-cultural program is that each full-time employee must earn 10 "diversity points" per calendar year. Points are earned by submitting a written summary or reflection regarding related experiences such as attending a diversity training, community service, community event attendance, etc. Compliance with this requirement is part of annual employee evaluations.

### **Office of Management and Finance**

**Mission/Goals/Strategic Plans** – OMF finalized its 2010-12 Strategic Plan recently which includes a revised mission, values and goals statement. The first listed value is "We manage with a customer focus". One of the four major goals is "Enhance customer service – Continuously improve our communications and focus on helping customers achieve their goals." Action items under this goal include continuing their annual OMF customer service survey, new budget mapping and publication tools, adapted HR recruitment processes, development of a Mobile Facilities Center, implementing fleet reporting tools and after-repair questionnaires, and many other division-specific customer service improvement related actions.

**Surveying** – In the summer of 2011, OMF conducted its sixth annual customer survey using contractor Olympic Performance, Inc. Results from all surveys can be found online at <http://www.portlandonline.com/omf/index.cfm?&c=46147>

Several bureaus and divisions within OMF also conduct their own customer service surveys including BTS, HR, Fleet and Risk.

**Workforce Development** – A big accomplishment for OMF in 2009 was the completion of their Succession Plan -

<http://www.portlandonline.com/omf/index.cfm?c=25949&a=178681>

The plan contains strategies for both recruitment and employee development and was prefaced with an overall goal to seek employees with the following abilities: communications, cultural competency, customer service, innovation, leadership, sustainability and technical skills.

Due to restricted budgets, training opportunities have been limited though an OMF-wide training initiative started recently with a Diversity Development Committee-organized event held in May 2011. Another was slated for July 2011. BHR is re-establishing a

Citywide training program, with plans to implement next fiscal year to help provide employee development opportunities that could not otherwise be done by an individual bureau or division. Despite these limitations, many activities aimed at improving customer service competency in the workforce were conducted by individual bureaus/divisions within OMF recently:

- HR trained all employees in the use of a problem-solving model and they re-branded the bureau with a focus of being Knowledgeable, Helpful and Responsive.
- BTS began a strategic planning process by identifying customer technology needs and developing key performance measures.
- The Revenue Bureau continued its employee customer service monitoring and coaching program.
- The Enterprise Business Solutions Division engaged employees in developing mission, values and goals consistent with OMF overall goals.

### **OMF/Human Resources**

**Mission/Goals/Strategic Plans** – The goals and strategies in their 2010-2013 Strategic Plan revolve around on a clear Mission Statement: Knowledgeable, Helpful and Responsive. This mission emphasizes understanding customers needs as well as ensuring that delivery of services is consistent yet nimble enough to be responsive in a constantly changing environment. The four goals in the strategic plan reflect this focus as well: Stewardship, Diversity, Customer Service and Progressive Employer. The Customer Service goal is: “We collaborate with customers to deliver programs and services that are responsive to their ever changing business needs”.

**Surveying** – They obtain regular, informal feedback from bureau directors and managers regarding the services provided. In addition, some program areas such as Employment and Development survey their customers to determine whether we have met their expectations and needs. Feedback is also received through various stakeholder groups, such as the Citywide Diversity Committee, FMLA coffees (regular meetings between the bureau FMLA coordinators and the City FMLA coordinator to discuss issues and concerns) and the Timekeeper meetings. Beginning in May, 2011 BHR contracted with AKT to develop objective, measurable, and achievable targets by which to measure the performance of service delivery to both internal (within BHR) and external (City bureaus) customers. Through this work they identified three key areas of focus: effective communication, regulatory responsibilities, and problem solving. In each area they developed the inputs, outputs, and most importantly, the outcomes by which to measure our performance. They expect to roll out our performance measurement plan and start collecting data by March 2012.

**Workforce Development** – Internally, the focus has been on areas that are the most critical to providing excellent customer service. All BHR staff were trained on the use of a problem-solving model. They began ongoing discussions and trainings on what it

means to be an engaged employee which is critical to customer service goals and they continue to refine what it means to be: knowledgeable, helpful and responsive.

They have started a number of programs and initiatives to develop not only the BHR workforce but the City's workforce as well. In response to repeated entreaties from bureaus over the years they are re-establishing a citywide training program. The new Training Manager starts in December 2011 and will work with customers to begin the process of creating this extremely important program. Also in response to feedback from our customers, the BHR site teams revised and improved the modules for the mandatory Manager and Supervisor Training, reducing the modules from six to four and emphasizing the core skills needed to be successful. This training is being rolled out starting the Fall of 2011. Labor Relations, in consultation with the city attorneys, is developing training on administering discipline, which will be available early in 2012. Citywide training for managers and for employees on HRAR 2.02—Prohibiting Workplace Harassment, Discrimination, and Retaliation has been updated not only to ensure the training does not become "stale" but also to reflect changes in laws and society. In recognition of the fact that about 1/3 of the City's workforce will be eligible to retire in the next year, the site teams are developing a Talent Development tool to assist bureaus in their succession planning. Additionally, they created a performance management class which the HR Business Partners are providing to their assigned bureaus.

Their 2010-13 Strategic Plan also indicates a redesigned internal performance appraisal process to integrate benchmarks and measurements that will assist in evaluating employees' accountability and performance-to-plan.

### **OMF/Revenue Bureau**

**Mission/Goals/Strategic Plans** – The Revenue Bureau's vision statement: "To provide the highest quality customer service while efficiently collecting revenues and providing regulatory oversight" is a great example of the incorporation of customer service values into a policy statement. The Bureau has begun the process of updating their 2008-2010 Strategic Plan and expect customer service to remain a strong focus. A customer service culture is facilitated by placing a high priority on customer service training, a Call Monitoring and Coaching program, and customer service improvements in individual programs like the Private-For-Hire Transportation program. They are in the process of expanding the Call Monitoring Program to the Regulatory Division of the bureau.

Customer service improvements in the Private-For-Hire Transportation program included streamlining the vehicle inspections process by moving to a different location with ample parking and offering on-site inspections for companies with large fleets. They also began using a source to obtain out-of-state driving records, rather than requiring applicants to obtain them, taking weeks or months of time off the process.



The Bureau now is able to allow credit card payments and the completion of Annual Exemption forms through their website.

**Surveying** – They continue to make available a postcard survey to office visitors and an online survey to users of website services. The short postcard survey is a great example of a simple method to get feedback from customers. In 2009-10 they received 153 responses with an average score of 4.86 out of 5 possible. They received 302 responses to a similar online survey with an average score of 3.26 out of 4. Survey results are analyzed and used as the basis for trainings and service delivery changes. Future plans include a mail survey sent to people who call the office.

**Workforce Development** – The Revenue Bureau has continued to work to embed customer service into the culture of the workplace. During the past year they have used the following:

- Collections technique training from Professional Credit Services
- A webinar on Resolving Workplace Conflict
- Videos on customer service and handling irate customers
- Communications hand-outs
- Recognition at staff meetings by management and by peers
- Customer service articles in their monthly newsletter
- Ongoing telephone skills review

During 2009, their entire staff completed modules 1 through 6 of the Employee Cultural Competency in the Workplace training program.

The annual performance evaluation is another effective tool that includes “Service Orientation” as a core competency for all reviews. Customer service questions are used in all job interviews. They are working on a couple of additional training sessions to be offered to staff – “Preserving the Customer Service Experience When you Must Say No” and another called “Communication Magic”.

### **OMF/BTS (Art Alexander)**

**Mission/Goals/Strategic Plans** – Customer Service is a core component of the BTS Service Agreement and Service Catalog. They are currently in the process of developing a Strategic Plan where customer relations initiatives and service improvements will be a significant component of the plan.

**Surveying** – Several different methods of soliciting customer feedback are used in their effort to continuously improve the quality of staff and services. In 2010 BTS completed their second annual comprehensive customer survey. BTS is using survey results to follow up with areas where customers expressed concern to improve processes. The next planned survey is for September 2011. In addition to this main survey they also use an email survey for their helpdesk that is sent to the customer upon the closure of a service ticket. The BTS Project Management Office also conducts customer satisfaction surveys

at the close of each project. The BTS Diversity and Cultural Competence Team now conducts an annual survey around issues of diversity and uses this to improve customer service delivery. In the coming year BTS will switch to using an externally hosted survey tool which will give them greater flexibility and capacity to conduct additional “point of service” surveys.

**Workforce Development** – In keeping with OMF’s overall succession planning efforts, BTS is incorporating customer service skills as a key element in recruitment efforts. The Customer Relations Division Manager attended training focused on Customer Experience Management and has been leading some internal Leadership Team discussions aimed at improving feedback options between customers/partners and BTS staff. BTS is also exploring greater use of social media tools and phone system improvements to aid in improving customer service.

### **Office of Neighborhood Involvement**

**Mission/Goals/Strategic Plans** – Over the past few years, ONI has worked with its Bureau Advisory Committee and other stakeholders to develop revised bureau mission, goals, and values statements. These were finalized in 2010. The values explicitly integrate components of customer service improvement throughout with language such as “We value our community relationships and show it by being flexible and listening – ensuring timely, accurate and helpful responses to those who work with us or seek our services.”; and “We seek to maintain the highest community trust through accountability and transparency in our processes and decisions.”

The new ONI mission statement reads: *“Promote a culture of civic engagement by connecting and supporting all Portlanders working together and with government to build inclusive, safe and livable neighborhoods and communities.”*

**Surveying** – ONI worked with the Auditor’s Office to incorporate some new questions into the Auditor’s community survey in order to obtain general feedback about progress towards ONI goals. These include:

- “In the past 12 months, how often have you been involved in a community project or attended a public meeting?” with a 36% of respondents answering between one time and more than 10 times.
- “Overall, how do you rate the quality of each of the following City services? Opportunities to influence government decisions” with a 32% rating it as “good or very good.”

These questions will be included in future community surveys and will provide trends to use in evaluating progress towards ONI community involvement goals.

The bureau has not conducted any additional formal customer service surveys. ONI is somewhat unique in that it is a small bureau but has a lot of different types of customers. Due to funding limitations, a full bureau-wide customer survey is not planned at this time.

**Workforce Development** – Customer service is an element in all recruitments and performance evaluations. No bureau-wide formal customer service trainings have been conducted, although individual staff have attended customer service training as well as trainings on dealing with challenging customers. The management team has discussed additional opportunities for staff training and plans to incorporate some related training into periodic all-staff meetings. ONI would benefit from the City making more low-cost customer service-related trainings available.

## **Parks & Recreation**

**Mission/Goals/Strategic Plans** – Parks’ organizational values of “respectful relationships, responsiveness to the needs of the public, and commitment to the safety and well-being of our visitors” – are intrinsic to good customer service. Their 2008-11 Strategic Plan includes the improvement of service delivery as a Key Result Area. PP&R developed a customer service standard as a guide for the bureau’s service delivery efforts. Other PP&R guidelines for ensuring good customer service include a Communications Standards Policy, an Internal Communications Standard of Practice for Management, and a Public Involvement Manual.

**Surveying** – Park’s Visitor Information, Survey, Trends & Analysis program (VISTA) coordinates, administers and analyzes various types of research and surveys to better understand user patterns, preferences and priorities. These include intercept surveys of parks and trail users, randomized surveys of city residents, and recreation program customer surveys. For example, Parks conducts an annual mail survey of customers who have registered for a recreational activity within the past 12 months. This survey is a new tool, and joins existing feedback channels of a web survey, comment cards at the community centers and course evaluations. ParkScan, a website for the community to report maintenance concerns, has completed its first annual report. From May 2009 to May 2010, they received 230 observations through ParkScan with the most received relating to maintenance issues. Parks also regularly uses phone surveys for surveying customers regarding their needs and preferences. Parks also does a nice job of surveying their internal customers with an Employee Workplace Survey. Results comparing 2011 vs. 2010 were mixed and the information is used in efforts to improve employee job satisfaction.

**Workforce Development** – Parks created its BEST (Bureau Employee Service Training) Program to provide consistent staff support and training. A six-session training series launched in October of 2009 and continued through May 2011. The training series covers every detail of customer relationship. Sessions are developed by collaborative committees of PP&R staff and offered at several different days/times to maximize staff participation. As the program enters its second year, the BEST organizing committee is working to assess its effectiveness through course evaluations to establish the tools and succession plan needed for a successful long-term program. A Customer Service Excellence Program was also developed specifically for the Customer Service Center

employees, with a particular emphasis on phone communication techniques. Bureau staff also take part in service-oriented webinars and trainings from leading industry organizations such as the Learning Resource Network (LERN), the Oregon Park and Recreation Association and the National Recreation and Park Association.

Customer service experience and competency is an essential part of the recruitment and hiring processes for all Parks employees. The Bureau's new employee orientation, which all new hires complete, also has customer service as a key component. Progress reviews include customer service as a primary measured component of work.

## **Police Bureau**

**Mission/Goals/Strategic Plans** – The values of the Portland Police Bureau (PPB), adopted in 2004, are commitments to the community and reflect the PPB mission statement: Integrity • Compassion • Accountability • Respect • Excellence • Service. The bureau is in the final year of its strategic plan and is currently developing a new one. Customer service improvement efforts are included in the existing plan through initiatives including enhanced community policing efforts and creating customer service standards for employees.

**Surveying** – Due to budget restraints, the Police Bureau has not been able to conduct a Community Survey since 2005. However, this year, as part of their budget process, they did conduct a Police Services Survey asking community members to prioritize core police services. About 350 responses were received and results will be used as part of their budget setting and strategic planning processes. The Auditor's Community Survey has been a useful tool for the bureau to gather perspective on customer satisfaction and perception of how safe residents feel in their neighborhoods.

Some key findings from the 2007 Community Survey include:

- Community members desire increased police visibility and general availability in neighborhoods to get to know and work more closely with the community.
- Involvement by residents in community public safety efforts is increasing.
- Officer behavior during traffic stops generally rated positive; however, African American residents are significantly more likely than others to believe that police are unfair.
- Residents feel safer and perceive crime as less of a problem than in the past and a greater proportion feels a sense of community.
- Citizen-initiated police contact performance ratings were slightly down in most categories.

**Workforce Development** – The Police Bureau's emphasis on improving workforce diversity resulted in the recent hiring of 7 minorities from a class of 15. A newly formed Diversity and Inclusion Leadership Council was created this year to address issues in an effort to retain a diverse and culturally competent workforce. The bureau's Advanced Academy and In-Service training includes classes on customer service competency and

improving communication skills. The bureau has customer service standards for employees tied to regular employee performance evaluations.

### **Portland Development Commission**

**Mission/Goals/Strategic Plans** – Customer service is specifically called out within their 2010 Strategic Plan under the Goal: “Effective Stewardship over Our Resources and Operations, and Employee Investment.” A key action within this goal is the use of customer satisfaction surveys. (see Surveying section below)

PDC continues to make significant strides of informing customers through use of YouTube, Twitter and Facebook.

**Surveying** – In August of 2009, the PDC completed a Customer Satisfaction Survey for Business Finance Programs, Community Development Programs and Single Family Housing Programs. The survey results reflected overall satisfaction, but the “timeframe to fund” and “follow-up communication” ratings by customers indicated some room for improvement. As a result, they embarked on a project called Finance ReThink which is designed to assess PDC’s financial products and determine the right suite of products to meet current needs and demands.

PDC has not performed additional surveying but hopes to do so in the future.

**Workforce Development** – A central focus of PDC’s workforce training in customer service has been to ensure that staff has a good understanding of diversity. PDC’s Diversity Council was formed in 2006, and it continues to provide ongoing opportunities for staff to engage diversity development activities.

Performance appraisals include an evaluation of customer service.

### **Bureau of Transportation**

**Mission/Goals/Strategic Plans** – The report did not provide the bureau’s mission, goals, etc. It does mention their 2004 strategic planning process and their Strategic Plan for 2004-9, which contains a value statement mentioning the importance of public service and community involvement.

The report makes mention of some specific workgroup efforts to improve customer service:

- Parking operations and the administrative front desk on the 8<sup>th</sup> floor have a great deal of customer contact and have put protocols in place for customer service.
- Maintenance operations have put in place specific service standards for response time.

- Traffic Investigations uses the TrackIT database to manage service requests about traffic safety concerns/suggestions.
- Communication and outreach strategies used throughout the bureau include distributing door hangers to inform of street sweeping and road maintenance projects, as well as outreach at community meetings relating to planning projects and budgeting.
- Staff liaisons to the Neighborhood District Coalitions and Business Districts regularly attend monthly meetings to listen to concerns and address issues.
- PBOT has a Transportation Advocate that works with the Mayor's Office to address citizen complaints and issues.
- The bureau Communications Team provides timely and responsive information to media contacts.

**Surveying** – The only recent surveying conducted was geographically based and related to specific PBOT projects. PBOT will be conducting a customer survey regarding the leaf removal program. There is no surveying on bureau-wide customer service.

**Workforce Development** – Administrative staff have gone through some customer service training via quarterly workgroup meetings over the past year. No updated information provided related to recruitment/hiring or performance appraisals.

## **Water Bureau**

**Mission/Goals/Strategic Plans** – The very first word of the Water Bureau's "Statement of Vision, Mission and Values" is Customer! - "Customer Focused, Motivated, Innovative, Professional, Stewardship." Their primary value is "Customers – Keep the needs and desires of our customers in the forefront of our thoughts and actions." The Water Bureau's Vision, Mission and Values Statements are incorporated into their 2008-11 Strategic Plan. In the plan, they have defined several specific customer service-based service level indicators. A couple of notable examples – Fewer than 7 water quality complaints per 1000 customers per year, and answer 80% of calls within 60 seconds. They also have a strategic objective with 4 tactics that are designed to improve customer service. It states: "Improve responsiveness to customer needs and promote engagement of the community," and includes tactics like using a variety of means to collect customer feedback and implementing a public involvement plan.

Since the adoption of the 2008-11 Strategic Plan, the Water Bureau has tracked progress in meeting defined service levels in the plan.

Outreach to its customers and the community has also been a big effort in recent years. Examples include the Water Bureau's use of their website and social media tools, brochure development, an "I Only Drink Tap Water" campaign, enhanced media relations efforts, free lead-in-water testing, outreach at special events and targeted outreach activities to promote participation in its financial assistance program.

Community Involvement and Information staff also conducted a variety of outreach activities in conjunction with a number of projects and programs.

The Water Line was set up to be a single point of contact for customers experiencing water quality or water pressure issues. This gives customers a single point of contact for specialized inquiries, taking some burden off the regular customer service line. In 2009, 2599 calls were logged (this was an increase of 364 calls from the previous year). All were responded to on the same day. 86% of these calls were resolved over the phone on the first contact. The Water Line group also handles lead testing kit requests. Call data is analyzed to assist the Operations Group in decision making.

**Surveying** – The Water Bureau has dramatically increased opportunities for customer feedback. It has a general feedback template on its Website. In 2007, the Customer Service Group's Call Center implemented a Satisfaction Survey that, on a weekly basis, samples customers who have conducted telephone business related to their bill. The current return rate is 18.79% which is above to the standard (10%) for mailed surveys. Of the surveys returned, 96.33% of the responses have been favorable or neutral. In 2008, the Water Line implemented a customer feedback form as well. Approximately 50% of the questionnaires (which are sent to all customers who contact the Water Line) are returned and the responses have been overwhelmingly positive. In the Fall of 2007, a large maintenance project was performed in the Hawthorne District and a follow up survey was sent to businesses in the neighborhood. Based on the success of that survey, the bureau intends to incorporate a similar survey into future projects.

**Workforce Development** – The bureau has spent significant resources recruiting with a goal of diversifying its workforce. Attendance at job fairs and community partnerships has been a big part of this effort as well as other cultural outreach activities.

Training and Evaluation have also focused on cultural competency trainings. Other training efforts have included a revamped new hire orientation/training, Training and Quality Assurance call reviews, Desktop Coaching, customized technical trainings and participation in professional organization training effort, etc...The bureau has a couple of staff charged with ensuring the successful operation of these programs.

In June 2010, the Water Bureau conducted an organization-wide Staff Engagement Survey. The Bureau also has a very established diversity group called BRIDGE, which sponsors events to improve cross-cultural awareness and cooperation. Improving internal communications has also been a recent focus. They have been piloting some internal social media efforts to assist with this.

**Mayor Sam Adams** – The Mayor's Office has a stated mission of providing high-quality customer service to every constituent that contacts the office. A Public Advocate receives all general inquiries directed to the Mayor's Office. The office's goal is to keep lines of communication between constituents and the Mayor open and transparent. They use email, the Mayor's website, Twitter, Facebook, a phone "comment line" and a

welcoming front desk to accomplish this. The Public Advocate keeps a file of emails and calls that have been addressed and how they've been followed up on. Customer service is one of the most vital components weighed during the hiring process. Policy teams are expected to participate in outreach to all stakeholders on any given issue in their policy area to ensure that the community is being heard and problems being addressed. Staff has weekly meetings where the Public Advocate reports and discussion takes place concerning the most pressing issues facing constituents. Staff is encouraged to participate in HR trainings around communications skills, crisis intervention, conflict resolution, cultural competency, etc.

**Commissioner Nick Fish** – Staff works collaboratively to serve all constituents, with individual staff appointed to troubleshoot specific types of issues. While each staff member is responsible for tracking their own groups of messages, the office's community liaison oversees the flow of communication to make sure the ball is never dropped. The policy of the Commissioner is to track every message and work in a timely and result-oriented manner to resolve questions, concerns and complaints. They do not survey constituents but they ensure timely delivery of services through self-tracking and weekly check-ins with the Chief of Staff. The staff is hired in part based upon their demonstrated ability to interact with members of the public. The position of Public Advocate is dedicated to forming and nurturing bonds with constituents, and responding to issues in a helpful, timely and effective manner. The position of Community Liaison works specifically with written correspondence and calls. All staff work continuously to form and maintain relationships with City bureau staff, which helps them to better serve constituents.

**Commissioner Amanda Fritz** – They have an office mission that states “as public servants and advocates, we provide effective leadership by using resources wisely, promoting citizen engagement, listening to and analyzing input, and sharing information and access.” They do not have a customer service survey. They use TrackIT to document all constituent correspondence. The Commissioner personally responds to a significant number of emails received. Everyone in the office is required to help answer phones, staff the front desk and respond to constituent concerns. The majority of staff participated in a dealing with difficult customer training. They have refined their protocols for referring concerns to appropriate staff.

**Commissioner Randy Leonard** – Commissioner Leonard's office has a policy which states that they strive to respond to each constituent in a friendly and timely manner. If they are unable to help a constituent resolve an issue, their aim is to facilitate a call from someone else from the City who can help. They do not presently survey customers nor do they have plans to do so. The office engages in ongoing training on how to assist with certain calls and requests, including discussions and troubleshooting in weekly staff meetings.



**Commissioner Dan Saltzman** – The report has been similar over the last 3 years. There is no specific mission statement or work plan regarding customer service; however, they have an understood directive to provide the best possible service to all constituents. They maintain full phone and front desk coverage during normal business hours to provide quick, courteous, and effective service. These responsibilities are spread across the entire office, depending on policy area. There is no formal customer service survey; however, they make sure the Commissioner sees and reads all constituent correspondence directed to him. Staff tracks responses using the TrackIT database. Staff meets weekly with the Commissioner to discuss hot topics to make sure a consistent response is provided to constituents. They have one full-time staff person who serves as the Public Advocate in order to oversee constituent correspondence and outreach.

- Completed and on-going
- ⊖ Partially completed, in process, or not stated explicitly
- Not completed

	Bureau Practices				Workforce Development		
	Report	Mission & Goals	Strategic Plan	Survey	Recruitment	Appraisal	Training
Bureau of Planning and Sustainability	●	●	●	⊖	●	●	⊖
Children's Levy	●	●	●	○	○	○	○
City Attorney	●	●	●	●	●	●	⊖
City Auditor	●	⊖	⊖	⊖	●	●	⊖
Community Technology	●	●	●	⊖	●	●	⊖
Development Services (BDS)	●	●	⊖	⊖	●	⊖	⊖
Emergency Communications (BOEC)	●	⊖	⊖	⊖	●	●	●
Emergency Management (PBEM)	●	⊖	●	⊖	⊖	⊖	⊖
Environmental Services (BES)	●	●	⊖	⊖	●	●	⊖
Fire / Police Disability / Retirement Fund (FPD&R)	●	⊖	⊖	⊖	○	○	○
Fire, Rescue & Emergency Services	●	●	●	●	●	⊖	●
Government Relations	●	⊖	⊖	●	○	●	⊖
Portland Housing Bureau	●	⊖	●	⊖	⊖	●	⊖
Management & Finance (OMF)	●	●	●	●	●	⊖	⊖
OMF/Human Resources	●	●	●	⊖	⊖	⊖	⊖
OMF/Revenue Bureau	●	●	●	●	●	●	●
OMF/Bureau of Technology Services (BTS)	●	⊖	⊖	●	⊖	○	⊖
Neighborhood Involvement (ONI)	●	●	⊖	⊖	⊖	●	⊖
Parks & Recreation	●	●	●	●	●	●	●
Police Bureau	●	⊖	⊖	⊖	⊖	●	●
Portland Development Commission (PDC)	●	⊖	⊖	⊖	○	●	○
Transportation (PBOT)	●	○	⊖	⊖	⊖	⊖	⊖
Water Bureau	●	●	●	●	●	⊖	⊖
Mayor Sam Adams	●	⊖	⊖	⊖	⊖	○	⊖

Commissioner Nick Fish	●	⊖	●	⊖	⊖	⊖	○
Commissioner Amanda Fritz	●	●	⊖	⊖	⊖	⊖	⊖
Commissioner Randy Leonard	●	⊖	⊖	○	○	○	⊖
Commissioner Dan Saltzman	●	⊖	⊖	⊖	○	○	⊖

### Rating Criteria

**Completed and on-going** – as of the date of this report, the bureau has provided documentation of their completion of, and significant ongoing efforts in, this category

**Partially completed, in process, or not stated explicitly** – as of the date of this report, the bureau has provided evidence that they are:

- Working toward completion or ongoing efforts of this category AND/OR
- The bureau has indicated that they believe the category has the status of completion or significant ongoing efforts, but information provided by the bureau does not support this (e.g. it is not explicitly stated, does not meet the established criteria)

**Not completed** – as of the date of this report, the bureau has provided no documentation of their completion of this category or has indicated that this category has not been completed nor has significant progress been made.

Agenda No.  
**REPORT NO.**  
 Title

Accept report of the Customer Service Advisory Committee (Report)

INTRODUCED BY Commissioner/Auditor: <b>Fritz</b>	CLERK USE: DATE FILED <u>JAN 12 2012</u>
COMMISSIONER APPROVAL Mayor—Finance and Administration - Adams Position 1/Utilities - Fritz <i>Adams</i> Position 2/Works - Fish Position 3/Affairs - Saltzman Position 4/Safety - Leonard	LaVonne Griffin-Valade Auditor of the City of Portland By: <i>[Signature]</i> Deputy
BUREAU APPROVAL Bureau: N/A Bureau Head: N/A	ACTION TAKEN: JAN 18 2012: <b>ACCEPTED</b>
Prepared by: John Dutt Date Prepared: 12/7/2011	
Financial Impact Statement Completed <input checked="" type="checkbox"/> Amends Budget <input type="checkbox"/>	
Council Meeting Date 1/18/12	
City Attorney Approval	

<b>AGENDA</b> <b>TIME CERTAIN</b> <input checked="" type="checkbox"/> Start time: <u>9:30</u> Total amount of time needed: <u>10 minutes</u> (for presentation, testimony and discussion)
<b>CONSENT</b> <input type="checkbox"/>
<b>REGULAR</b> <input type="checkbox"/> Total amount of time needed: _____ (for presentation, testimony and discussion)

FOUR-FIFTHS AGENDA	COMMISSIONERS VOTED AS FOLLOWS:		
		YEAS	NAYS
1. Fritz	1. Fritz	✓	
2. Fish	2. Fish	✓	
3. Saltzman	3. Saltzman	✓	
4. Leonard	4. Leonard	✓	
Adams	Adams	<i>[Signature]</i>	<i>[Signature]</i>