



CITY OF

PORTLAND, OREGON

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To: Karla Moore-Love, Council Clerk
From: Commissioner Amanda Fritz
Date: January 6, 2010
Re: Annual Customer Service Advisory Committee report

The Customer Service Advisory Committee (CSAC) is presenting their second annual report to City Council on January 13, 2010. City Council will vote on accepting the report.

2008-9 City of Portland Customer Service Status Report

Executive Summary

This is the second report of the Customer Service Advisory Committee (CSAC), which was created as the result of City Council's Resolution No. 36438 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. Encouraging bureaus to gather customer feedback through formal surveys, focus groups, etc.
3. Developing customer service competencies in the workforce through bureaus' hiring, performance evaluations, and training.

The CSAC has compiled a "Toolkit" of information gathered from city bureaus to serve as a resource for other bureaus looking to improve customer service. City service specific "site teams" made up of CSAC members are a resource for bureaus as they work on their customer service improvement efforts. The toolkit and site team contact list are accessible via our website, www.portlandonline.com/csac.

In addition to serving as a resource for bureaus, the CSAC is charged with monitoring and assessing customer service efforts of city bureaus. A status report on customer service efforts is submitted by bureaus as part of the budget process. Information from these reports, as well as from follow up work with bureau representatives is used to produce the annual Customer Service Improvement Status Report (see attached).

Overall, the CSAC found the emphasis on customer service improvement has grown across the city over the past couple of years. Several bureaus have made huge strides to improve customer service, others have taken small steps, and some bureaus have just begun their efforts. Budget cuts have impacted customer service improvement efforts as bureaus strive to deliver services in the most cost efficient manner. One example is the Bureau of Development Services, which lost over half of its staff due to budget cuts in 2009. When capacity is reduced severely, it is difficult to provide the same level of customer service. However, in difficult fiscal times good customer service should remain a high priority. It is one of the ways to best mitigate the impact of service reductions and retain a measure of public support.

It is important to note, this status report does not evaluate the quality of bureau's customer service. The CSAC looks at bureau efforts to achieve improvement in the key areas identified by the committee and approved by Council resolution. A few but certainly not all, of those efforts are highlighted below...

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

Among others, the **Water Bureau, Parks & Recreation** and **Revenue bureaus**, have gone through strategic planning efforts which successfully included customer service as a key focus in formulating mission, goals and values statements. The newly reorganized **Housing Bureau** and **Office of Neighborhood Involvement** are also in the process of strategic planning and are making customer service a central focus. Many bureaus are working hard to focus on customer service in specific projects. A few examples include; the **Water Bureau's** newly instituted Water Line which gives

customers a single point of contact for customers; **Parks & Recreation's** implementation of ParkScan, a 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

Several bureaus have implemented formal customer survey tools over the past year. Last year only **Fire, Police, Bureau of Development Services, the City Attorney's Office** and parts of **OMF** and the **City Auditor's Office** had formal customer survey tools in place. Over the past year, many more bureaus have started to survey their customers including the **Revenue Bureau, Parks, PDC, Water, BTS** and the **Audit Services Division of the Auditor's Office**. The **Office of Emergency Management** is also in the process of implementing a customer survey and the **Attorney's Office** and **OMF** have revised their surveys to include recommendations from the CSAC.

Workforce Development

Most bureaus, with the support of Human Resources, are working on making customer service skills and awareness a component of workforce development. Many have made customer service a formal part of their recruitment/hiring efforts as well as a consideration in formal performance evaluations. Some bureaus are not able to conduct formal performance evaluations, but bureaus such as **Development Services** and **Revenue** have worked through their Labor Management Committees to pilot performance review programs. The **Housing Bureau** is asking partner contractors to complete surveys on the quality of customer service provided by Housing Bureau staff.

In the current fiscal environment, the ability of bureaus to offer formal customer service training to staff has been limited. This should be a high priority for the entire city when resources allow. The **Water** and **Revenue** bureaus retained some customer service focused training. In 2008, the **Water Bureau** hired staff to do in-house training focused on both custom technical and customer service. **Revenue** conducts monthly customer service trainings which include video presentations, role play/interactive trainings and seminars. Other bureaus such as **Parks, BDS** and the **Auditor's Office** have also had staff attend various one-time customer service related trainings. **BOEC, Revenue** and **Water** have all implemented new quality assurance/coaching programs with in the last year.

Summary

The CSAC is encouraged to see the progress as highlighted above but we also recognize the limits to customer service improvements that exist in our current fragmented service delivery systems. We believe that in order to take the next step in service delivery, the city will need to implement a central citywide customer management system when budget projections improve. In the mean time, we encourage bureaus to continue to place an emphasis on providing quality customer service with the resources available in their individual service delivery systems.

FY 2008-09 City of Portland Customer Service Improvement Efforts Status Report

BPS/Planning and Sustainability

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – The Bureau of Planning and the Office of Sustainable Development were merged into the Bureau of Planning and Sustainability in January 2009 so they submitted their reports separately.

These two organizations are still in the process of merging, which includes coordinating their mission, goals and strategic planning efforts.

The Planning Division of BPS is operating under their Strategic Plan of 2006-2010. This plan and their current Mission, Values and Objectives statements include some customer service elements but contain little customer service efforts outside of their communication and outreach.

The Planning Division has emphasized outreach and customer service in many of its specific planning project efforts. Often this is through Bureau staff works primarily on specific projects in certain geographic areas of the city. It is also part of the purpose of several of the Bureau's core programs.

- The District Liaisons work on outreach and involvement to the community as a core part of their mission and liaison services they provide to community groups, businesses and individuals. District Liaisons also undertake with specific projects with a significant degree of community outreach and service such as the East Portland Action Plan and the Cully Concordia Assessment.
- The bureau has worked on its online document library to make it more accessible.
- Their Bureau's Youth Planning Program has worked to make better integrate youth into the City's planning, sustainability and development activities. The Program produced a youth involvement manual and worked with the city's PortlandOnline to make the website more accessible to youth. They have been involved in "co-host tours" with neighborhood representatives from the bureau and community representatives going out to the community for meetings.
- Their current work plan, including a public engagement and involvement strategy, is being refined in discussions with the Mayor's office.
- The development of the Portland Plan has involved a significant amount of outreach activities with neighborhood coalition offices, business organizations, community organizations and other stakeholders through dozens of open houses, workshops and presentations in 2008.

The Sustainability division of BPS has been operating under their strategic plan of 2003. Their mission includes specific mentions of "taking pride in providing responsive customer service", "engage and listen to customers, colleagues and partners" and "communicate openly and respectfully".

The Solid Waste & Recycling workgroup responds to residential customer comments and complaints via a telephone hotline and an e-mail address. Staff covers both of these during all regular business hours and has a stated policy of responding to all messages within 24 hours, although the response time is usually much shorter than that. The workgroup provides information regarding collection of solid waste, recycling and yard debris and often acts as an intermediary to assist residents in resolving issues with their hauler. On average, approximately 1,275 customers are assisted each month.

This group has specific customer service policies and procedures including response time goals, tracking of the number and nature of customer calls and e-mails, how to handle written inquiries and difficult calls, etc. The workgroup supervisor currently is evaluating how this information is captured and considering potential process improvements.

Additional Solid Waste & Recycling staff are in regular communication with residential and commercial haulers. They provide information regarding the requirements of the bureau's administrative rules and assist in resolving hauler-initiated issues. The workgroup has worked hard for several years to develop a positive and trusting working relationship with the haulers operating in the City.

This workgroup also is responsible for enforcement of both the Residential and Commercial Administrative Rules. They track initial reports of rules violations, investigations of these reports, results of investigations and any specific enforcement actions taken against the haulers.

BPS is reviewing their existing phone messages on various public lines with the goal of updating them to be more useful and user-friendly.

As these bureaus finalize their merger, it would be beneficial to keep customer service improvements as a key element in their strategic planning efforts. A comprehensive, bureau-wide approach to customer service improvement should help establish a culture of customer service throughout the organization.

Assessment

Neither of these bureaus has conducted a bureau-wide customer service survey in recent years, though some of their individual programs and projects do conduct surveys.

For example, the Green Building Hotline sends a customer service survey form to callers/emailers every two weeks. The information is collected and compiled into an annual report that is shared with Green Building Program partners. Similarly, the Recycle at Work program will be evaluated in 2010 to gather perceptions and feedback from participating businesses. The feedback will be used to improve the program's service offering, delivery and staff protocols.

The bureau also indicates that they are developing a program to send follow-up emails to everyone who sends a message to the Solid Waste & Recycling email address.

In addition, the bureau indicated that they have commissioned surveys to track customer satisfaction with regard to several other projects, including the new recycling and yard debris roll carts, Fix-It Fair events, student evaluations for the Master Recycling Program and Recycle as Work and Portland Composts! program participants. For example, when the recycling roll cart pilot was conducted in 2008, BPS gathered opinions and perceptions about the pilot from the affected residents. Based on this feedback, the program revised its customer service and program delivery to achieve a higher customer service standard before rolling it out to all residents. BPS expects to follow this same model for the food scrap collection pilot slated to roll out in spring 2010.

Significant stakeholder surveying is being undertaken as part of development of the Bureau's new strategic plan.

Workforce Development

Planning indicates they include customer service as a key element in their recruitment and hiring practices and that it is included in their performance evaluations. No specific customer service trainings have been organized for staff.

A Senior Coordinator position was filled in the Solid Waste & Recycling Program by someone with experience supervising customer service groups. He is working on evaluating and improving customer service in this key customer service department.

There is no mention of recruitment, appraisal or formal customer service training in the Sustainable Development report.

Cable Communications & Franchise Management

Customer Service Status Report – Yes.

Mission/Goals/Strategic Plans – The Office of Cable Communications and Franchise Management's (OCCFM) Customer Service Plan specifically references customer service improvement elements in its Goals and Objectives. Their role in enforcing cable franchise requirements and assisting community members in complaint resolution regarding cable communications involves intensive customer service to many different customer groups. Their utility franchise management role also requires good relationships with regulated industries.

OCCFM conducts regular customer outreach and survey work relating to specific programs and projects such as the Wireless Antenna on Utility Pole Options discussion, the Cable Franchise Renewal Process, DTV Conversion Information and Outreach and their Cable Complaint Tracking System.

Surveying – The bureau uses outreach surveys as an important tool in determining community needs around telecommunications and utilities. A good recent example was a very effective TrackIT survey the bureau used to get feedback around the issue of Cell Tower Alternatives. They also have a very efficient and effective system to handle complaints about local cable providers using an MS Access database. The bureau's work in surveying customers has proven successful in resolving customer complaints.

Workforce Development – Customer service is a key competency that is weighed heavily in the hiring process, including recruitment and interviewing. The bureau uses a performance, planning and evaluation document to evaluate skills related to customer service provision. There was mention in the report of a customer service training component in their regular staff meetings, but no specifics or supporting information was provided.

City Attorney

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – The City Attorney's Office has very explicit mention of customer service in both its Mission and Goals statements. They also have some specific written customer service expectations in their Work Plan, such as 24-hour response times to legal requests, no automated phone systems, increased front desk coverage and enhanced training for front line staff. Their most recent Work Plan for 2008-09 added "provide excellent customer service" as an explicit office goal.

Surveying – The City Attorney’s Office’s primary customers/clients are the employees of city bureaus who use their legal services in an official capacity. The Attorney’s Office conducts regular surveys of its customers. A survey was conducted in 2008 with another planned for 2010. The survey is a good example of a TrackIT survey and does a good job of incorporating the principals of the CSAC Surveying Guidance Document in assessing some of the aspects of customer service that were identified in this recommendation (timeliness, accuracy, helpfulness, expertise and availability of information). The 2008 survey added “Timeliness” as a new question in response to the 2006 survey indicating this area was the most commonly expressed concern.

Workforce Development – The City Attorney’s Office values having adequate and competent front desk coverage. The employee Performance Evaluation process includes discussion on how employees can improve customer service for the office in the upcoming year. In 2009, one of the office’s staff meetings is slated to have a focus on customer service training. They recently designated a staff person as a customer service representative charged with handling all public record requests, written inquiries, phone call referrals from the front desk staff and media requests.

City Auditor

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – The Auditor’s Office mission statement does not mention customer service directly, although some division goals do address customer service.

Surveying – There is no general Auditor’s Office customer service survey, but three divisions do survey customers. The Ombudsman and Independent Police Review (IPR) divisions solicit feedback from each complainant, and Audit Services survey auditees after each audit is completed.

IPR’s 2008 Annual Report includes 15 pages summarizing the data from this customer survey. The Complainant Survey was developed in 2002 and the division started using it the same year. The survey instrument was developed in a cooperative effort between of IPR staff, John Campbell of Campbell De Long Resources, Inc. and the Audit Services Division. The survey is mailed out to all complainants on a quarterly basis. Response rate has been very low (20%), which has created concerns about the accuracy and usefulness of the data. In 2008 they had data from only 35 returned surveys to use for their analysis. In 2008 there were some nice satisfaction rating increases, but the majority of complainants indicate dissatisfaction with the process overall. IPR has used survey data to try to improve case-handling decisions and office processes. They have modified their intake process and attempted to improve communications with complainants on cases in response to some of the survey feedback.

The Ombudsman publishes a Survey Results section in their annual Ombudsman Report. The survey had been mailed to all complainants, but because of low response rates, they decided to add an online option for survey taking and are using Survey Monkey. All complainants are emailed a link to the survey unless they indicate they would prefer one mailed. Results from the 2008 responses were encouraging and helpful. They received their best ever satisfaction rating to the question “Did staff listen carefully to your complaint?”, but saw a drop in the rating for “Did staff provide helpful assistance?” As a result of this the office is working to provide more value added assistance when working with complainants.

Audit Services designed and implemented a survey of auditees during the summer of 2009 to assess the quality of the audit experience and to solicit feedback from bureaus after audits are completed. Auditees are asked to provide a service rating in response to these questions: 1) The audit team adequately explained the audit approach and scope; 2) The audit team maintained an adequate level of communication throughout the audit; 3) The conduct of the audit team was professional; 4) The recommendations in the report were reasonable and useful; 6) The draft report was provided to us, and we had an opportunity to provide input; 7) Overall, I am satisfied with the audit process. Auditees are also asked to provide any other general comments they may have.

Workforce Development – The Auditor’s Office incorporates customer service into most aspects of their workforce development, including the recruitment/hiring process and ongoing performance reviews. Annual customer service training is required for all frontline staff. Auditor’s Office employees are asked to submit any customer service improvement suggestions at the time of their annual performance reviews.

Development Services (BDS)

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – BDS has put tremendous emphasis on improving customer service over the past 6-7 years. Customer service is reflected in several of the bureau’s key planning documents, including their Mission, Goals and Values; Management Principles and Expectations and Employee Handbook. They went through another strategic planning processing in 2008, resulting in a new Strategic Framework document to guide continued customer service improvements. Unfortunately, 2009 has seen BDS hit harder than any city bureau with budget reductions due to reduced permit revenue. As a result, the bureau has lost over half of its staff and has been forced to make significant service reductions. Some of their specialty customer service programs have been reduced or suspended due to these cuts, though the bureau is trying to maintain the customer service culture they have worked hard to cultivate.

Surveying – Since 2002, BDS has dedicated significant resources to conducting extensive annual customer service surveys and focus groups through contracts with a few vendors. The information from these surveys has been used to identify areas for improvement. The CSAC suggests other city bureaus use BDS survey efforts as a model.

Workforce Development – The bureau has established an Outreach Committee that develops recruitment plans for each open position in the bureau. The plans include methods for reaching diverse populations with diverse backgrounds. Interview panels are educated on communicating with people from diverse backgrounds and include interview questions related to customer service. Customer service is a key skill evaluated in the hiring process.

The BDS Labor-Management Committee has been “piloting” a recently created performance review process. All managers are participating and represented employees can volunteer to participate. The performance review includes customer service as an evaluated competency. Due to budget constraints, this project was put on hold as of August 2009.

BDS put together and conducted a Front-Line Orientation for BDS staff the past couple of years. The orientation has been useful to help bureau staff better understand the functions of individual departments and the bureau as a whole.

Customer service training has been a major emphasis for the bureau over the past several years. All staff participate in formal customer service training provided by outside contractors. Over the past couple of years they have worked with several different outside vendors to provide customized customer service training to staff. These contractors have included Michael Meines, Black Belt Biz Solutions and Alanna Hein.

Emergency Communications (BOEC)

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – BOEC's 2008-10 Strategic Plan makes direct references to customer service in its vision, mission and values. Strategic Direction 1 included an annual publication of partner agency and community survey results; though development started, the project was placed on hold in 2009. Strategic Direct 2 included instituting a formal quality awareness program and performance evaluations. Much of this work has been completed. In addition, a formal Partner Issue Resolution Process was developed as a customer service improvement effort in 2008.

Surveying – BOEC had been developing a partner agency survey and a community survey, but they are currently on hold. They are a participating bureau in the Auditor's SEA resident survey that is published annually.

Workforce Development – BOEC conducts ongoing performance reviews with operations employees that contain a customer service component. In 2008, they implemented a new Quality Assurance (QA) program.

Software was purchased to assist with QA, but due to problems with the software the bureau embarked on a manual method of performing QA, including:

- Twice weekly management reviews of high profile incidents.
- Monthly performance evaluations of the represented staff, to include 2 calls and a SAL.
- Continuous Quality Improvement process for Fire specific calls/type codes
- Continuous Quality Improvement process for EMS specific calls/type codes

During all reviews the calls are evaluated for adherence to bureau standard operating procedures and triage guide specifications. If the calls are found to be out of compliance, the employee is notified of the area of concern and additional reviews may be performed. If the employee continues to be out of compliance, the employee is placed on a plan of action.

During the Continuous Quality Improvement process (CQI) for both Fire and EMS calls, each call is evaluated to determine if the applicable questions are asked, and if the necessary pre-arrival instructions were relayed. This process has been extremely beneficial in determining changes to the triage guide, most specifically with questions and medical information. The CQI committees are comprised of representatives from the partner agencies, BOEC employees, Port of Portland employees and Multnomah County EMS representatives. This makes for a truly collaborative approach.

Emergency Management (POEM)

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – Through continual engagement, training, and information, the Community Emergency Services program serves as POEM's outreach, education and 'public face' in the community, to city bureaus and partnering agencies. POEM provides a single point of contact for questions and concerns, a 24 hour on-call Duty Officer and Backup Duty Officer, development of a customer service committee, and public information's contact for media inquiries. In addition, POEM promotes coordination and collaboration among existing volunteer programs through the Neighborhood Emergency Teams in raising community awareness to reach underserved populations in the event of any emergency.

POEM is working to expand their customer service efforts by current improvements to the bureau's website, partnering with other bureaus for quick links for timely information and resources, leadership in the Public Alerts website, customer service survey expansion, and one stop shopping for finance forms and direct links for regional UASI (Urban Areas Security Initiative) partners.

Surveying – POEM recently developed and instituted a customer service survey via the web. Unfortunately, results were inconclusive due to minimal response. An expansion phase is being developed to more explicitly request feedback from partnering agencies, other bureaus and the Neighborhood Emergency Teams.

Workforce Development – The Office of Emergency Management places strong emphasis on customer service from our initial recruitment requests; Job Announcements that specifically attract strong customer service focused employees and concepts that are integrated into the interview process.

In addition, Bureau policies are being finalized and will incorporate a customer service standard. POEM's customer service committee will review new opportunities to expand employee training and development, to include customer service standards in a newly developed performance.

Environmental Services (BES)

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – BES includes customer service elements in a variety of bureau mission and value documents for both the bureau and individual departments. Their Strategic Plan focuses on partnerships and outreach but could place greater emphasis on customer service. BES' customer service efforts focus primarily on community outreach with regard to sewer development and watershed projects. City bureaus such as BES, BPS and PBOT all indicate that a lot of their customer service efforts are related to community outreach particular to specific public infrastructure projects. It would be helpful to try to ascertain the effectiveness of these efforts and how these processes could be improved. A couple of examples of specific BES programs that have conducted successful outreach and partnership are their Portland Pollution Prevention Outreach Team and the Spill Prevention and Citizen Response program.

Through its sponsorship and participation on the Portland Pollution Prevention Outreach Team, the bureau provides educational messages and technical assistance to citizens and businesses throughout the Portland-metro area to encourage pollution prevention and reduce toxics in the environment. Over 80 auto shops, 14 landscaping businesses, and nearly 200 dentists have been certified as an Eco-logical Business and are listed on Ecobiz.com. Staff conduct site visits, provide information and assistance

regarding meeting certification requirements, and include compliant businesses on the Ecobiz website. Businesses are visited by staff annually to confirm continued compliance with the program.

BES's Spill Prevention and Citizen Response (SPCR) program provides 24 hour response to citizen calls regarding pollution complaints, spills, sanitary sewer overflows, dye tests, and other pollution related issues. Eight staff representing Industrial Source Control, Field Operations, Coordinated Site Analysis, and Spill Protection & Citizen Response rotate serving as duty officers, responding to calls to the Spill Response Hotline. All calls to the hotline are returned within 30 minutes. In FY 08-09, the hotline received nearly 4,000 calls, with between 80%-90% of the calls warranting a site visit. Nearly 350 calls were received after hours, with staff responding on-site to 44 calls.

Surveying – BES conducts geographically targeted surveys for particular projects. In 2005, they also used a private contractor to conduct a telephone survey for the entire bureau to assess public perceptions about water quality, awareness of and support for BES services, projects and programs, and to determine the level of support for increased fees to meet future needs. They were hoping to conduct another similar survey in 2008, but it has been put on hold due to cost and budget issues. This survey could more explicitly ask for feedback with regard to customer service because the 2005 version did not specifically address the bureau's customer service delivery.

Workforce Development – The bureau has incorporated customer service into its hiring and evaluation processes. Customer service concepts are integrated into its interviewing process as well as employee performance reviews. The concepts are incorporated into management/supervisory training and employee protocols/expectations. They have two standing committees that continue to address many issues related to improving customer service-- the Committee for Workplace Excellence and the Management Excellence Program. There was no indication of any formal customer service training effort for bureau staff as a whole.

Fire/Police Disability/Retirement Fund (FPD&R)

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans –

In 2007, the FPD&R Charter was rewritten, dramatically changing the organization. FPD&R is also currently going through a comprehensive strategic planning process. In 2009, they have been conducting stakeholder/community building forums with staff, Fire and Police members and other stakeholders to develop relationships and to develop plans for the future of the organization. Customer service will be a major element discussed in this process.

In September 2009, with the assistance of a consultant, FPD&R held "Community Conversations" with stakeholders. They are waiting for the consultant's report and will meet with the Police and Fire Employee Associations to discuss the results.

Assessment

FPD&R is planning to re-implement an annual or biennial member survey. The last one was conducted in 2004. The outcome is pending the planning process described above.

Workforce Development

Recent hiring processes have placed greater emphasis on customer service. There is little in the way of formal customer service training though some individual staff has attended customer service related training.

Fire, Rescue & Emergency Services

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans –

Their Mission, Vision, Principles statement includes some very specific customer service elements, including: “We are responsive to our customers, always ready, always there, providing efficient and effective service to the public and each other.”

The bureau’s 2008-09 Annual Business Plan includes the following goal: External and Internal Customers Experience Consistent, Timely, Quality, Customer Service from all Levels of the Organization. The plan includes numerous strategies to achieve the goal.

Surveying – A formal customer survey was conducted in 2004 for use in the 2005-10 Strategic Plan. They have plans to conduct another survey in 2010 in preparation for the 2010-15 plan. They also have been using an online TrackIT customer service survey on their website.

Workforce Development – The bureau’s current Strategic Plan contains Workforce Development as one of its 3 Strategic Themes. Goal #9 is to Maintain a Highly Trained and Educated Workforce, Goal #11 is to Demonstrate Leadership in the Area of Cultural Competency and Goal #12 is to Enhance Effectiveness of Staffing and Human Resource Processes. Some of the objectives included in these goal statements include additional training that is primarily technical job training, development of a mentoring program for all new lieutenants, career development training and cultural competency trainings.

The bureau has undertaken significant recruitment efforts to increase the diversity of the workforce and has an ongoing cultural competency program. The Recruitment Officer has primary responsibility for implementing the Bureau’s outreach recruitment initiatives. He or she informs the public of employment opportunities within PF&R; works with community groups and organizations to recruit applicants who otherwise might not have applied to become fire fighters; establishes and maintains relationships with key community leaders; represents PF&R at job fairs, career days, community events, ceremonies, and fund-raisers; develops advertisements for community-based newspapers; and conducts presentations at high schools and colleges in the area.

PF&R conducts annual appraisals for all non-rep members that includes a customer service component. At present their collective bargaining agreement does not allow for formal performance appraisals of represented staff though they do emphasis customer service strongly in their hiring and probationary period practices.

Government Relations

Customer Service Status Report – Yes.

Mission/Goals/Strategic Plans –

There is no specific mention of customer service in the mission and values statements, though their goals include a couple of customer service goals. Their report indicates a primary goal over the past fiscal year has been to increase communication efforts and offer resources to their internal customers.

Another secondary goal has been to identify other external customers and to look at how to increase customer service efforts to them as well.

Surveying – Government Relations is working on reintroducing a comprehensive customer service survey following the 2009 legislative session. They discontinued surveying after the 2001 session, but are looking at bringing back an improved, more useful tool. No update has been received regarding progress.

Workforce Development – The report indicates they have spent considerable resources developing training seminars for staff to improve in the areas of communication, public speaking, customer service, media relations and long-term strategic planning. Specific details on this training have yet to be provided. The Director schedules annual performance evaluations for all office staff.

Housing & Community Development (BHCD)

Customer Service Status Report – Yes.

Mission/Goals/Strategic Plans – FY 2008-09 was a challenging year for BHCD (now called Portland Housing Bureau), with a bureau reorganization including significant staff and leadership changes. Though the change hampered some customer service efforts, it also created opportunities to renew a culture of customer service within the bureau.

Part of this renewal effort has been the revision of their Mission, Vision and Values statement, which now includes:

- High standards of accountability and customer service to the community
- Continual evaluation and improvement of programs and initiatives
- Supporting the working environment

Many contractors (the bureau's primary customers) are not receiving payment quickly (some wait as long as 6 months). To address the problem, the bureau has focused on creating new processes and expectations to create a solid base to build their customer service efforts. They have hired a new Operations Manager, trained staff on the new SAP system, streamlined payment processes and put expectations in place to guide staff efforts. They have also produced Workplace Principles and Business Operations Expectations documents, which are foundational to their current attempts to improve customer service.

Surveying – The bureau plans to conduct a customer survey after the new Portland Housing Bureau transition is complete, in order to form a baseline measure of customer satisfaction. Following this, they plan to conduct semi-annual surveys.

Workforce Development – Recruitment efforts have been recently modified to better recruit persons of color and also to place greater emphasis on customer service. The bureau advertises in local minority/community newspapers, and interview questions help assess customer service skills and experience. Sample interview questions used by the PHB include:

- Please describe what customer service means to you and your best practices for serving customers.
- Give us an example of how you helped an upset customer.

A new Business Operations Manager was hired, and customer service expectations were clearly established and signed off on by all employees as part of her initial efforts at working with bureau staff.

The updated performance evaluation template includes key customer service elements for evaluation; competencies that include these elements are Workplace Environment and Communications. Their performance review process includes a solicitation to contractors about the quality of customer service received from BHCD staff. They use an online SurveyMonkey survey to solicit this input from partners.

Management & Finance (OMF)

Customer Service Status Report – Yes.

Mission/Goals/Strategic Plans – OMF has gone through extensive strategic planning processes over the past 7-8 years that have included customer service as a key component. The result has been some very specific customer service organizational values and goals as well as specific plans for surveying and training.

Surveying – In 2008 OMF conducted another online customer survey of all its bureaus and divisions. They modified the survey in 2008 to include the exact six components of customer service that Bureau Innovation Project #7 included in their recommendations to Council. This is an excellent example for other bureaus devising a customer service survey. A summary of these survey results is online at www.portlandonline.com/omf/index.cfm?c=46147. The survey is part of an overall multi-year Customer Service Improvement Initiative undertaken by OMF to help establish a better culture of customer service within the bureau. There are plans to conduct a similar survey in 2009.

Within OMF, several of the individual bureaus/divisions have conducted independent surveys more specific to their area of operation. Those include the Bureau of Technology Services, City Fleet and Risk Management. Specific results have not yet been obtained.

In addition to the survey, in recent years OMF has also requested Focused Reviews of several of its bureaus and divisions, including Business Operations, Purchasing, and Printing and Distribution, to ensure they are providing the most effective and efficient services to their customers.

Workforce Development – Their report mentions facilitated customer service training for OMF employees. No further details or supporting documents have yet been obtained.

Over the past year, OMF has developed succession plans for most of its bureaus/divisions and should be completed with this process in spring 2009. A template was developed as a tool for recruitment and retention of employees. The template includes language about good customer service skills.

OMF/Bureau of Technology Services (BTS)

Customer Service Status Report – Yes (Part of OMF)

Mission/Goals/Strategic Plans

Customer Service is at the core of the BTS Service Agreement and Service Catalog. Periodic surveying is part of BTS' commitment to customers and staff. It is an important element of our efforts to continuously improve the quality of staff and services.

Surveying

In 2009, in collaboration with customers, BTS developed and conducted an extensive survey (88 questions) offering customers the opportunity to provide ratings and commentary on all BTS Divisions. (*BTS services were also evaluated in the annual Management and Finance survey.*)

Survey questions addressed the performance areas recommended by the CSAC but narrowed them down to four categories; Timeliness, Communication, Quality, and Effectiveness.

The results are being analyzed and a summary will be published. BTS is following up in areas where customers expressed concern. The 2009 survey is considered a baseline survey. The value of the systematic surveying will increase as more surveys are conducted and trends are identified and analyzed. BTS will work with customers to carefully refine the survey. The next survey will be distributed in June.

In addition to the main Customer Satisfaction survey:

- The BTS Support Center, the unit with the highest frequency of customer contact, now sends customers a survey immediately after every closed ticket
- The BTS Project Management Office conducts customer satisfaction surveys at the close of each project

Workforce Development – BTS, in keeping with OMF succession planning efforts, will be incorporating customer services skills in recruitment future recruitment efforts.

OMF/Revenue Bureau

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – Their 2008-10 Strategic Plan addresses customer service in a significant way.

Vision Statement – *To provide the highest quality customer service while efficiently collecting revenues and providing regulatory oversight.*

Core Values –

Customer Focus: *We value our customers and will continue to provide them with service that is balanced and solves problems in a fair, timely, efficient, cooperative and courteous way.*

Professionalism: *We value integrity and honesty, being well-trained, competent, helpful, knowledgeable, respectful, hard working and conscientious.*

Accountability: *We value sound business practices in the administration of our duties and transparency in policies and procedures.*

A staff appreciation event in April 2009 and regular recognition at staff meetings by management and peers for excellent customer service have also been key to creating a positive customer service culture.

Technology developments in response to customer demands have included the development of the online Business Look-up tool and a current project to offer credit card payments through their website.

Surveying – Revenue has a Customer Service Survey for walk-in patrons, as well as an online Zoomerang survey with 10 questions regarding customer service provided to visitors of the office that was implemented in 2008. Results are being used as a basis for customer service training, implementation of website changes and development of new tools such as their business look-up tool.

Workforce Development – In September 2008 Revenue began monthly customer service trainings – video presentations, role play/interactive trainings, and seminars. They purchased videos from a variety of vendors, including Kantola, CRM, and Star-thrower. The quality of these videos varies. Seminars were done through Skill Path, and role play/interactive trainings were developed and conducted in-house. A goal for FY 2009-10 is to continue with a more focused approach for specialized work groups.

The Call Monitoring and Coaching Program, a pilot program developed by the bureau labor/management group in 2008, has been a great success. Revenue adopted guidelines and institutionalized the program in 2009. The Regulatory Division added Avaya phones to join the review program.

During 2008 the bureau began conducting annual performance evaluations of all staff that include customer service as an evaluated skill. They also continue to emphasize customer service in the hiring process through interview questions and job announcements.

Neighborhood Involvement (ONI)

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – ONI has been engaged in a strategic planning process with its stakeholders to update its Mission, Goals and Values. They have come up with new mission and goals statements. The new goals statements include “Provide accurate information and responsive and effective services to community members and organizations”. They are still working on the values statements, but the latest draft includes: “We provide excellent customer service, ensuring timely, accurate and helpful responses to community”.

Assessment

There has been some discussion amongst the management team and the Bureau Advisory Committee about formal surveying of customers, but there are no definite plans at this time due to funding limitations. The I&R department is hoping to implement some type of customer feedback survey in the coming year.

Workforce Development

Customer service is an element in all position recruitments and performance evaluations. The formal evaluation document does include customer service as a competency/performance factor. No formal bureau wide customer service training has been provided, though individual program staff has attending trainings offered by PCC, Franklin Covey and other partner agencies, such as Verbal Judo training through Portland Parks and Recreation.

Parks & Recreation

Customer Service Status Report – Yes.

Mission/Goals/Strategic Plans – Parks went through a significant strategic planning process resulting in their 2008-2011 Strategic Plan. Improving service delivery was a key result area within this plan. The Customer Service Standards project resulted in a document titled “Portland Parks & Recreation Customer Service Standard.” These standards have been used to develop evaluation tools to identify current levels of service and to develop strategies to improve service, specifically at recreation facilities.

A couple of good examples of policy/procedure changes reflective of this customer service emphasis are a Communications Standards Policy that helps to define employee expectations with regards to written and phone communications.

Parks also has a very proactive public involvement program, modeled on the principles of Bureau Improvement Project #9. The program utilizes innovative techniques for higher-profile, more complex projects such as the Mt. Tabor Central Yard and Washington Monroe High School redevelopment efforts.

Assessment

Recreation Facilities: A new Customer Satisfaction Survey and Site Assessment Form were developed based on the Customer Service Standard for recreation facilities. The survey began in late January 2009. Initial results have been analyzed, and summary reports have been compiled, quarterly. The survey is available to all recreation facility customers and offers incentives to provide feedback. They also conducted a random sample mailing of the survey in the summer of 2009. The response rate was lower than they had hoped and the responses to the questions were overwhelmingly positive. This data will be used to track changes and trends that will be helpful to determining what types of service modifications should be made.

The Site Assessment Form is a tool used to launch a “Secret Shopper” program in the summer of 2009. This program involves both site visits and a phone shop program. The current program target is to conduct two phone shops and 2 site shops for each of their facilities. Initial results have given some helpful data to identify areas they are doing well with and areas which they need to work on improving via training.

Parks also conducted a Summer 2008 telephone survey, which gauged the recreation programming preferences and needs of Portland residents, in order to better serve Parks current and future customers.

Park Facilities: Parks has implemented a new online feedback tool called ParkScan. With the help of a grant from the Sloan Foundation, Parks was able to implement a web tool that allows park users to report park maintenance concerns to park maintenance supervisors. ParkScan was launched in Spring 2009.

Parks also contracted with Portland State University to do a statistically representative survey of Portland residents about their parks and recreation facilities preferences. Researchers conducted a series of intercept surveys in parks during each quarter of 08-09, in order to better understand how people use parks, and to begin long-term efforts at understanding the needs of the community as customers of Portland’s park system.

Internal Services: Parks has also undertaken an effort to survey internal customers of its Central Support Services work units in order to improve internal customer satisfaction. This surveying began in May 2008.

Another internal tool is an Employee Satisfaction Survey that they have used for several years. Results from the 2008 survey showed substantial improvement from the prior year. Employee satisfaction was up 12% and the percentage of staff that felt the bureau was moving in the right direction had increased 24% from the 2007 survey. Information from this survey is used to develop annual work plans for the Employee Communications Committee, all-staff meetings and the winter employee luncheon.

Workforce Development

Customer service experience and competency is a key part of the recruitment and hiring process for all employees. Parks also has a new employee orientation that includes customer service expectations as a key component. Progress reviews for “customer service employees” include customer service as a primary measured component of work.

Parks partnered with the Parks Foundation and TACS (Technical Assistance for Community Services) to provide Cross Cultural Effectiveness and Customer Service training in 2008 for employees.

Currently (and always growing), PP&R collaborates with over 90 friend and partner groups. Together these groups collaborate with PP&R to deliver programs and services to the public-at-large. In addition to these groups of friends and partners supporting the paid workforce – delivering direct services to customers -- PP&R enlists the help of thousands of individual volunteers, logging in nearly 500,000 hours annually. This is the equivalent of over 200 FTEs and a conservative value of \$5 million. Customer service training for these individuals is not yet formalized.

Police Bureau

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – The 2007-2012 Community Policing Strategic Plan is Chief Sizer’s effort to build better relationships between the Police Bureau and the community. This new community policing strategy places significant emphasis on customer service through enhanced relationships, improved accountability systems and recruitment and hiring improvements, including:

- Increased interaction with youth through youth programs/schools
- Precincts organize and host community events
- More visible police presence via “community policing”
- Measure officers’ performance by community member satisfaction with services and officers’ involvement in community activities.
- Expand community engagement by involving the public in policy and service decisions.
- Precinct Advisory Councils and Public Safety Action Committees
- Bureau Budget Advisory Council
- Review Boards
- Cadet and Citizen Police Academies
- Community contact offices

Assessment

2007 Community Assessment Survey Highlights

Questions related to customer service:

- Q13 – “Please rate the overall quality of assistance you received on a scale of 1 to 5” – rated for several different ways of contact with Police
- Q14 – “ Using a scale of 1 to 5 rate how you feel Portland Police are serving the community in the following areas” – Examples – quick response, providing advice, giving useful info, involving the community, working with citizens, etc.
- Q18-25 – Specific police stop questions – did officer explain why stopping, answer questions, polite, professional.

Key findings from the 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 is generally rated positively; 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 feel a sense of community.
- Citizen-initiated police contact performance ratings were slightly down in most categories.

Workforce Development

- Increased diversity and quality of recruits through participation in community events, job fairs, and school presentations
- Working to institute a semi-annual performance feedback program
- Cultural competency and diversity trainings offered regularly
- Establishing an employee mentor program
- Officer recruitment – volunteers participate in the oral interview phase of the officer selection process

Portland Development Commission (PDC)

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – PDC’s mission and values statements contain explicit references to customer service. Several specific policies address customer service, including their Communication Policy and Public Participation Policy.

Assessment - Over the past year, PDC has put together some formal customer surveys. In the summer of 2008 they created a draft survey that included questions for customers who had contact with PDC storefront, business finance, home loan and repair, and community development financial programs. In January 2009, they issued an RFP to solicit vendors to conduct phone surveys. They worked with a contractor, The Pulse Group, to devise the survey which is an excellent example of a phone and online customer survey. This survey establishes a baseline performance measure for overall satisfaction with PDC, awareness of PDC programs, communications, application and approval processes, perception of

PDC's role in the community and ways in which PDC can excel at providing customer service into the future.

Workforce Development

No mention is made of recruitment or training with regard to customer service. They do include customer service as a key competency in addition to communications, cultural competency and dependability in their annual performance evaluations.

Transportation (PBOT)

Customer Service Status Report – Yes.

Mission/Goals/Strategic Plans – The Customer Service Report focused on PBOT's stewardship of public resources as an infrastructure bureau. There was little specific mention of customer service improvement efforts in their mission or strategic change measures. They went through a strategic planning process in 2004 which produced the strategic plan for 2004-2009. Value statements mentioned the importance of public service and community involvement, but customer service and specific elements that define customer service were not explicitly identified.

Customer Service Tactics – Current customer services practices are mainly via telephone interaction but there is also face-to-face interaction. Most incoming calls for parking operations are from citizens wanting and/need immediate resolution to their request. The focus for handling these requests is to reach an agreement on what the issue is and then assisting with resolution. Front Desk service is handled with the same level of understanding, patience and conflict resolution. Their face-to-face interactions are handled with great skill, active listening skills and excellent non-verbal communication. The Front Desk consistently receives emails, phone messages or letters praising their dedication to providing the best customer service.

Maintenance Operations has posted 100 "pot hole hotline" signs around the City. The goal is to repair all reported pot holes within 72 hours. Additional service standards are in place for employees responding to home/business owner reports of sewer back-ups and/or failures.

The Traffic Investigation's section responds to approximately 1000 requests from the public to evaluate changes to the transportation system each year. Many of those requests originate from calls to the traffic safety hotline 503-823-SAFE. That line is staffed by a single person that discusses the requestor's concerns, explains potential solutions and answers many questions. A service request is often created which is documented in the TrackIT system. Those TrackIT requests involve a wide range of traffic engineering solutions including requests for traffic signals, crosswalks, STOP signs, left-turn signal phases, traffic calming devices and many other safety related improvements related to traffic signage and pavement markings. Those requests are investigated by a traffic engineer and a report of their findings is provided to the original requestor via letter, email or phone.

Additionally, the Traffic Investigations section provides traffic engineering services for review/approval of work zone traffic control plans required to obtain permits to perform work in the public right-of-way. Staff works with contractors to ensure their work zone traffic control plans provide safety to the general public for passage through their work zones. Over 300 traffic control plans from the Permit Center are processed per year. Staff provides processing over-dimensional load permits for truckers moving over-sized loads on City streets. That work requires discussions with the

trucking firms to identify routes, adequacy of the affected roads and bridges, coordinating with ODOT, verifying insurance and finally issuing permits. A total of 450 – 500 permits are processed per year.

Some special customer services in PBOT includes providing neighborhood door hangers to announce sweeping efforts and road work. Community outreach for neighborhood budget forums and planning projects for neighborhoods are done annually. Additionally, members of the Directors Team are assigned to a Neighborhood District Coalition and attend monthly meetings. PBOT also provides a staff liaison to each Business District. Staff attend monthly meetings, listening to concerns and troubleshoot issues. They forward questions and concerns of other city services to the appropriate bureau. A Transportation Advocate work with citizen's complaints and helps resolves issues. The Advocate also troubleshoots transportation complaints that come via the Mayor's Office. The Communications Team provides excellent customer service by their timely responsiveness to external press and media requests. They also respond timely to internal customers not only from PBOT but from other bureaus and the Mayor's Office. Additionally they maintain a daily presence on the publicalerts website providing service alerts.

Surveying – The report indicates that PBOT regularly conducts geographically based customer surveys concerning specific projects, but no information was provided indicating they conduct regular customer service surveys. PBOT will be conducting a customer survey regarding removal of leaves from streets in early 2010.

Workforce Development – Aside from Parking Enforcement, no mention was made in the report regarding workforce development efforts in the area of customer service. Previous information obtained from Parking Enforcement prompted the CSAC to identify them as a model of workforce development/training efforts. However, within the last year the administrative staff has gone through customer service techniques via quarterly meetings of the group.

Water Bureau

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans – A major customer service effort was implemented in 2007 through the bureau's Raising the Bar campaign, resulting in their 2008-11 Strategic Plan Statement of Vision, Mission and Values, which places great emphasis on customer service. Customers are specifically mentioned as #1 in the bureau's values.

The Strategic Plan spells out specific service level indicators for customer service in a variety of aspects of the bureau's service delivery:

- 75% give High or Very High rating on Auditor's SEA survey
- Respond to customer inquiry or request within 5 business days
- Answer 80% of calls within 60 seconds
- Fewer than 7 water quality complaints per 1000 customers per year
- No more than 5% of customers out of water for more than 8 hours a year
- No customer is out of water more than 3 times per year
- Complete 90% of service installs within 15 days
- At least one working hydrant within 500 feet of service connection
- Maintain minimum pressure of 20 pounds per square inch (psi) during normal demands
- Complete mandatory projects on schedule

The Plan also spells out some very specific strategic objectives regarding improving responsiveness to customer needs and promoting engagement of the community:

- Tactic: Implement monthly billing to increase convenience for customers and respond to expectations for more manageable total costs (water, sewer and storm water) per bill.
- Tactic: Use a variety of means to collect customer feedback and assess current customer needs. Design and implement customer service improvements to respond to those needs.
- Tactic: Promote community engagement by developing and implementing a bureau-wide **public involvement plan**, particularly for capital projects.
- Tactic: Increase number of maintenance districts from 2 districts to 4 districts to provide better customer service and improved accountability.

Some specific recent accomplishments related to customer service improvement efforts include:

1. Web Site restructure and enhanced online presence – blog, Facebook, Twitter
2. Publications/inserts in water bills and door hangers – “Understanding your Water and Sewer Bill”, “I Only Drink Tap Water” bumper stickers, “Notice of Increased Usage” and “Keep Your Meter Clear” hangers.
3. Lead Hazard Reduction Program – free testing, mailings, improved water quality report sent to households.
4. Financial Assistance Program – increased education and outreach efforts.
5. Community Involvement/Outreach increased in conjunction with projects and programs.
6. Hydro Park Program to develop new parks in communities on city property.

The Water Line (phone line) was established as a single point of contact for customers experiencing water quality or pressure issues. This line has helped alleviate some of the call burden from the main Call Center and is decreasing the need to dispatch maintenance crews.

Surveying – The Auditor’s SEA Report showed improvement in residents’ ratings for the overall quality of water service for the **4th consecutive year!**

The Water Bureau website has a TrackIT form that invites general questions or comments from the public.

In June 2008, the Customer Service Group’s Call Center implemented a new Customer Satisfaction Survey of customers who have conducted business related to their bill via phone. The return rate (13%) has been above average for this type of survey and 97.5% of responses have been favorable or neutral, with only 2 negative responses. 611 surveys were sent to a random sample of customers who had contacted the WB Call Center via phone with an equal number of surveys sent for each call taker. Feedback has been used to assist in training and quality assurance efforts.

In August 2008, the Water Line implemented a customer feedback form. All callers are sent a return postage paid questionnaire. The response rate has been an outstanding 50%.

Workforce Development – Efforts include increased involvement in job fairs and other outreach efforts, especially to students and minority groups.

Training Efforts – In 2008 two full time trainers were hired by the bureau to work with the Customer Service and Maintenance/Construction groups to develop and execute customized trainings. Many of these trainings have focused on customer service. Irene Reskin, 503-865-2270, is the training coordinator that has developed the bulk of the customer service related trainings.

Trainings have included:

- A redesign of new hire training
- Technical Courses for the Customer Services group including “Budget Billing” and “How to Use the Imaging System”
- Managing Difficult Customers training was offered in 2008.
 - conducted by contractor - Innovative Growth Solutions
- “Working with Angry Customers” training offered October 2008
 - developed in-house
 - 38 staff completed (most all of the CS staff)

A Quality Assurance Supervisor position was added to the Call Center and Walk-In Center to coach staff, to improve the quality of service, and to develop relevant training. Desktop Coaching is being developed – a Lead Rep will spend one-on-one time with Reps to listen, support and identify best practices.

The BRIDGE program has been formed by employees to focus on cross-cultural awareness and cooperation internally. Cultural outreach to enhance customer service competency is realized through extensive staff participation in city cultural diversity events, such as the Dialogues on Racism program. Cultural competency training is made available.

The Internal Communications Committee was created with representatives from each of the bureau work groups to improve internal communications. The committee has worked with the bureau’s public information staff to create graphics standards, etiquette guidelines for email communications and a closed loop TV program (“WaterVision”) to provide information to employees without email.

Commissioner Fish

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans - The office has no formal mission and values statement, but does have a policy that states they will track every constituent message that reaches them and work in a timely and result-oriented manner to resolve the question, concern or complaint. Commissioner Fish oversees the Parks Bureau and Housing Bureau. As noted in this report, Parks has made significant customer service improvements over the past year and Housing is in a transitional phase as an organization. Housing noted in their report that the Commissioner’s office has taken great interest in their customer service improvement efforts and that they do submit regular related reports to him.

The office employs an individual in the position of Public Advocate that is dedicated to working with constituents and responding to issues they bring to the office.

Surveying - The office does not have a formal customer survey, but does have semi- formal processes in place for tracking constituent interactions and reviewing them as a team.

Workforce Development - The report indicates that the Commissioner's staff members are hired in large part based upon their demonstrated ability to interact with members of the public. Individual staff report to Chief of Staff Sam Chase on a regular basis to discuss the types of correspondence they are receiving and their success in resolving them. There is no mention of formal evaluation or training.

Commissioner Fritz

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans - The Commissioner's office has no explicit mission statement related to customer service but they have a goal to respond to all constituents in a timely and professional manner. They consider constituent service one of their most important responsibilities, and one they all share. They use TrackIT to track all correspondence, phone calls and in-person visitor contacts to the office.

Surveying - They do not have a customer service survey. They have closed nearly 3,000 TrackIT entries in the first 6 months of being in office. In addition, the Commissioner herself has met with over 200 people since taking office and personally has responded to thousands of emails.

Workforce Development - Everyone in the office is required to help answer phones, staff the front desk, and respond to constituent concerns. All staff participated in a training by the Office of Neighborhood Involvement regarding dealing with difficult customers. The office has refined protocols for referring concerns to appropriate staff members, and continues to do so.

Commissioner Leonard

Customer Service Status Report – Yes

Mission/Goals/Strategic Plans - The office has no formal mission or values statements but indicated they have a strong commitment to customer service as demonstrated through their hands-on work with bureaus in their portfolio (Water Bureau, Fire Bureau and the Bureau of Development Services) to improve the customer service provision within these bureaus. As an office, they have a stated goal to respond to each constituent in a friendly and timely manner and to get the constituents the help they are looking for without bouncing them around.

Surveying - They do not survey customers and do not currently have any plans to do so.

Workforce Development - The report indicates they engage in ongoing training on how to deal with certain calls and requests. This is mostly informal training through weekly staff meeting discussions.

Commissioner Saltzman

Customer Service Status Report – Yes

Mission/Goals/Strategic Plan - The Commissioner's office does not have a stated mission statement or work plan, though there is a directive in the office to provide the best possible service to all

constituents. They maintain full phone and front desk coverage during normal business hours to ensure that people contacting their office get assistance in a timely manner. They strive to respond quickly, courteously and effectively to constituent letters, emails, phone calls and drop-ins. These responsibilities are spread across the office, depending on the policy area, and if the Commissioner or staff is unable to help, the constituent is directed to the appropriate office or bureau.

Surveying - They do not conduct any customer service survey. They make sure the Commissioner sees and reads constituent correspondence directed to him and track responses and follow-up using the TrackIT database system.

Workforce Development - Staff tracks all constituent correspondence, specifically tracking numbers of pro, con and neutral opinions about controversial, sensitive issues before Council. Staff meets weekly to discuss these items with the Commissioner in order to generate an effective, informed and courteous response. In the last year, the Commissioner has designated one full-time staff person as Public Advocate, in order to oversee constituent correspondence and outreach as well as to distribute assignments to the rest of staff.

Mayor's office

Customer Service Status Report – Yes

Mission/Goals/Strategic Plan – The Mayor's office has a clearly understood policy of providing high-quality customer service. Staff is expected to respond to city employees and constituents in a timely, helpful and competent way.

The Mayor employs three full-time public advocates (one housed in the Mayor's office, one in PBOT and one in Planning and Sustainability), one part-time community liaison, and one volunteer public advocate's associate to assist with constituent needs.

The office developed as many ways as possible for constituents to access the Mayor and his staff: two email addresses; the Mayor's website, which feeds contacts directly into the TrackIt system; Portland Online; City Info; social media, including Twitter, FaceBook, and My Space; telephone, including a dedicated phone line for each advocate, as well as a general comment line; traditional snail mail; and by promoting a welcoming attitude toward walk-ins.

The Mayor participates in answering constituents by doing so promptly and in a conversational manner.

Surveying – The Mayor's office does not do any formal surveying. Staff often acts as "air-traffic controllers" in that they refer constituents to the appropriate commissioner's office or directly to bureau personnel most able to assist, so customer satisfaction would be gauged through those offices.

Workforce Development – Customer service is a key competency that is weighed heavily in the hiring process.

The Mayor's staff meets every morning to touch base on current issues and to brainstorm resources and solutions. Staff is 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 are being addresses. Public

Advocates and the community liaison are expected to do outreach to the various city bureaus, local businesses, non-profits and community groups with which they work in order to facilitate good communication and a seamless response to concerned voiced.

Public Advocates participate in weekly, all-staff meetings by reporting on the most pressing issues facing constituents. Time is then spent by the entire staff on brainstorming and coordinating solutions.

The public advocates and the office manager participate in various trainings throughout the year – including crisis intervention, conflict resolution, and cultural competency – to enable them to effectively and appropriately assist constituents.

- 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
BPS/ Planning	●	⊖	⊖	⊖	●	●	○
BPS/ Sustainability	●	⊖	⊖	⊖	○	○	⊖
Cable Communications & Franchise Mgmt.	●	⊖	●	●	●	⊖	⊖
City Attorney	●	●	●	●	⊖	●	⊖
City Auditor	●	⊖	⊖	●	●	●	⊖
Development Services (BDS)	●	●	●	●	●	⊖	●
Emergency Communications (BOEC)	●	⊖	●	⊖	⊖	●	⊖
Emergency Management (POEM)	●	⊖	⊖	●	⊖	⊖	○
Environmental Services (BES)	●	●	⊖	⊖	●	⊖	⊖
Fire / Police Disability / Retirement Fund (FPD&R)	●	⊖	○	○	⊖	○	⊖
Fire, Rescue & Emergency Services	●	●	●	⊖	●	⊖	⊖
Government Relations	●	⊖	⊖	⊖	○	⊖	⊖
Housing & Community Development (BHCD)	●	⊖	⊖	⊖	⊖	●	⊖
Management & Finance (OMF)	●	●	●	●	⊖	○	⊖
OMF/Revenue Bureau	●	●	●	●	●	●	●
OMF/Bureau of Technology Services (BTS)	●	⊖	⊖	●	⊖	○	○
Neighborhood Involvement (ONI)	●	●	⊖	⊖	●	●	⊖
Parks & Recreation	●	●	●	●	⊖	⊖	●
Police Bureau	●	⊖	●	●	⊖	⊖	⊖
Portland Development Commission (PDC)	●	●	●	⊖	○	●	○
Transportation (PBOT)	⊖	○	⊖	⊖	○	○	⊖
Water Bureau	●	●	●	●	⊖	⊖	●
Commissioner Nick Fish	●	●	●	⊖	⊖	⊖	⊖
Commissioner Amanda Fritz	●	●	⊖	⊖	⊖	⊖	⊖
Commissioner Randy Leonard	●	●	●	⊖	⊖	⊖	⊖
Commissioner Dan Saltzman	●	●	⊖	⊖	⊖	⊖	⊖
Mayor Sam Adams	●	●	⊖	⊖	⊖	⊖	⊖

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)

<p>INTRODUCED BY Commissioner/Auditor: Fritz</p>	<p>CLERK USE: DATE FILED <u>JAN 08 2010</u></p>
<p>COMMISSIONER APPROVAL</p> <p>Mayor—Finance and Administration - Adams</p> <p>Position 1/Utilities - Fritz <i>Amanda Fritz</i></p> <p>Position 2/Works - Fish</p> <p>Position 3/Affairs - Saltzman</p> <p>Position 4/Safety - Leonard</p>	<p style="text-align: center;">LaVonne Griffin-Valade Auditor of the City of Portland</p> <p>By: <i>[Signature]</i> Deputy</p>
<p>BUREAU APPROVAL</p> <p>Bureau: N/A Bureau Head: N/A</p>	<p>ACTION TAKEN:</p> <p style="font-size: 1.2em; font-weight: bold;">JAN 13 2010 ACCEPTED</p>
<p>Prepared by: John Dutt Date Prepared: 1/5/10</p>	
<p>Financial Impact Statement</p> <p>Completed <input type="checkbox"/> Amends Budget <input type="checkbox"/> Not Required <input checked="" type="checkbox"/></p>	
<p>Council Meeting Date 1/13/10</p>	
<p>City Attorney Approval</p>	

AGENDA
<p>TIME CERTAIN <input checked="" type="checkbox"/></p> <p>Start time: 9:30</p> <p>Total amount of time needed: 15 minutes (for presentation, testimony and discussion)</p>
<p>CONSENT <input type="checkbox"/></p>
<p>REGULAR <input type="checkbox"/></p> <p>Total amount of time needed: _____ (for presentation, testimony and discussion)</p>

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 ✓	