

City of Santa Fe, New Mexico

memo

Date: August 5, 2015

To: Governing Body

Via: Brian Snyder, City Manager *SM for BS*

Fr: Sevastian E Gurule, Constituent Services Division Director *SEG*

Re: 311 Pilot Project Summary Update

ITEM AND ISSUE

311 pilot project summary update.

BACKGROUND AND SUMMARY

On 01/28/15 the Governing Body approved a 311 pilot project for the City of Santa Fe; the project started on 02/23/15. As this was a pilot project, the three-digit phone number "311" was not activated by Century Link and all cellular carriers. The objective of this project was to simulate an actual 311 (non-emergency) call center by routing the main (published) phone numbers for Animal Services (955-2701); Streets (955-2411 and 955-3000), and Anti-Graffiti (955-2253 and 955-2255) in addition to the main phone number for Constituent Services (955-6949). More importantly, the goal was to study how we are currently responding to our customer's needs – providing public safety, core and quality of life services in an effort to develop a systematic approach to employee development, process streamlining and identifying/implementing new technologies. Ultimately, our objective was to identify how, we as an organization, can enhance the overall customer service experience with the City of Santa Fe for residents, businesses and visitors.

The key targets we focused on were:

- Conduct a thorough review of the webpages for the divisions/sections listed above;
 - Identify any weaknesses in accuracy or accessibility;
 - Provide suggested changes;
- Identify the current call volume;
- Determine if the additional call volume into Constituent Services can be managed by existing staff;
- Identify how requests from the public are being addressed and tracked;
- Identify how tasks are assigned, tracked and how performance is measured;
- Identify how this information is analyzed to improve customer service, the delivery of services and the allocation of resources;
- Identify how departments/divisions are communicating with each other and the public;
- Identify the current customer service follow-through process;
- Identify opportunities to increase efficiencies (internal and external);
- Identify the data to be analyzed and how it will be collected;
- Develop a call center work schedule;
- Receive feedback from each division (Identify the pros and cons)

Staff met with the City of Albuquerque's 311 Division Manager, Esther Tenenbaum, several times to obtain suggestions on developing an implementation strategy for this pilot project. Several meetings were also held with the divisions noted above in an effort to thoroughly study and understand their existing internal policies, procedures and workflow. Constituent Services staff reviewed the webpages for each division/section and identified potential changes. In addition, a new interactive Graffiti Removal Release of Liability PDF form was developed and the anti-graffiti Access database was updated. Also, in an effort to further assist Constituent Services staff, each division developed an internal list of Frequently Asked Questions (FAQs).

The following is a list of information we collected during this project.

Data Collected between 02/23/15 – 05/16/15

- Call Volume through the city's telephone software system (Avaya BCMS Vu Client). This system tracks the number of calls for the five extensions listed above:
 - Received
 - Answered
 - Average Answer Time
 - Average Talk Time
 - Received/Made from our direct extensions
- Constituent Services' independent call type count by the following categories:
 - Request for Information Only
 - Request for Services
 - Transfer (Calls that transfer to a specific staff person by request)
- Formal request tracking using the city's CRM system, which include:
 - Request Category
 - Assigned Department
 - Date Request Submitted
 - Closed Date
 - Source
 - Status
 - Average number of days to close out requests ticket

311 Simulation Call Volume During Workweek (7:30 AM to 5:00 PM)

Below are the statistics from 02/23/15 through 05/16/15 (twelve (12) weeks):

- Calls Answered: 1,996
- Avg Call Answer Time: 12 seconds (approximately 3 rings)
- Avg Talk Time: 0:01:08

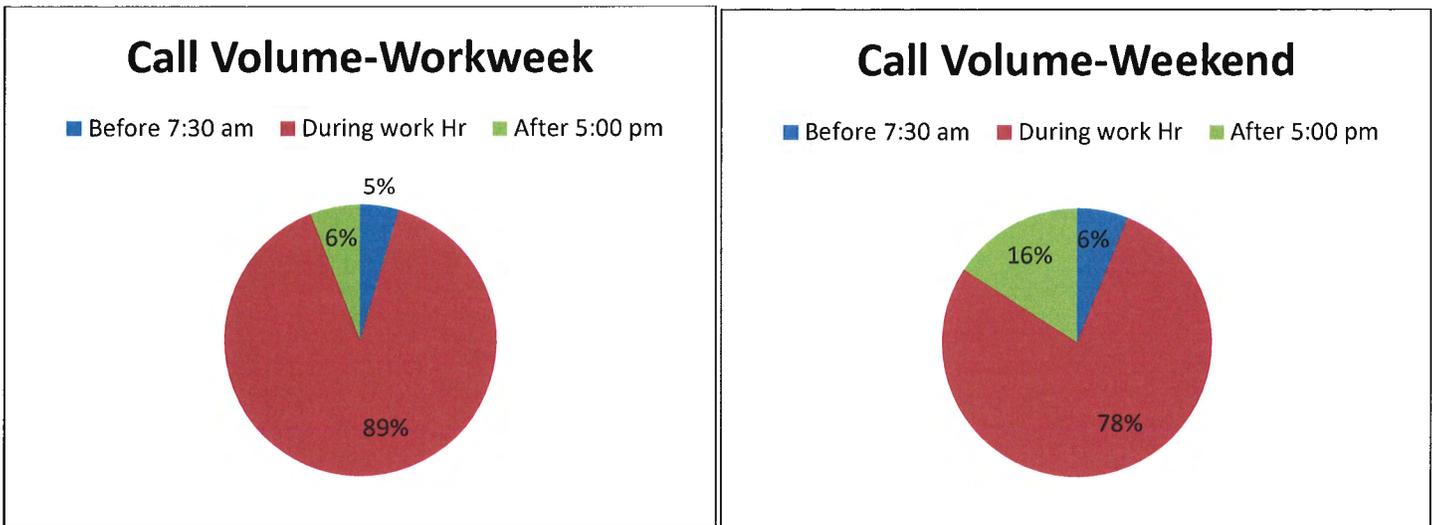
Before/After Hour Call Volume Details

Weekday Details

- Calls Received before 7:29 AM: 101
- Calls Received after 5:00 PM: 134

Weekend Details

- Calls Received before 7:29 AM: 15
- Calls Received between 7:30 AM – 5:00 PM: 192
- Calls Received after 5:00 PM: 39



Inbound/Outbound Call Volume using Constituent Services direct phone extensions

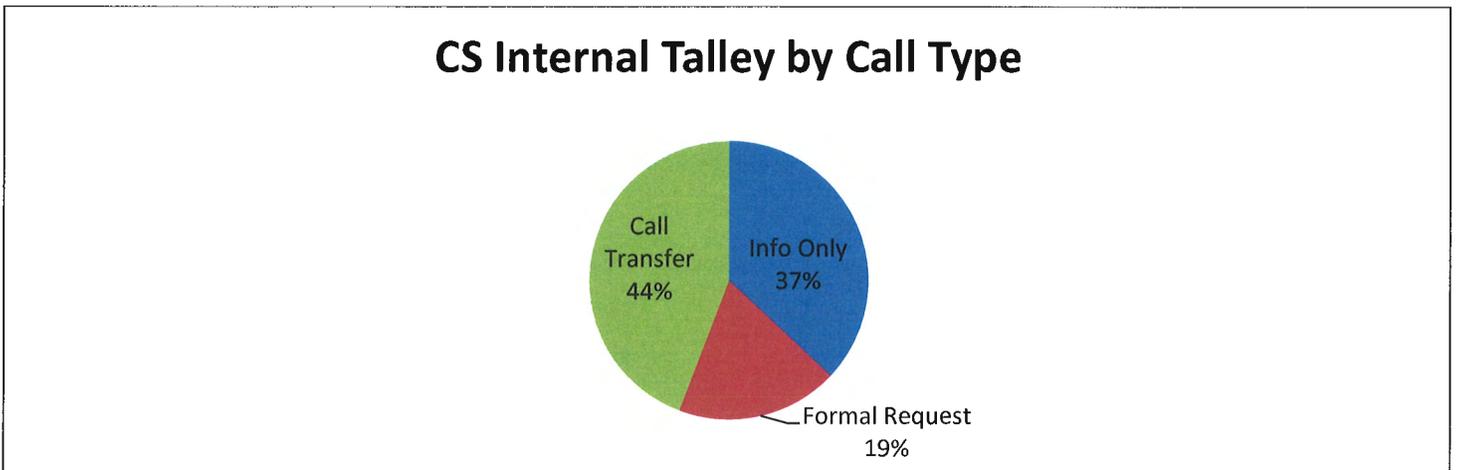
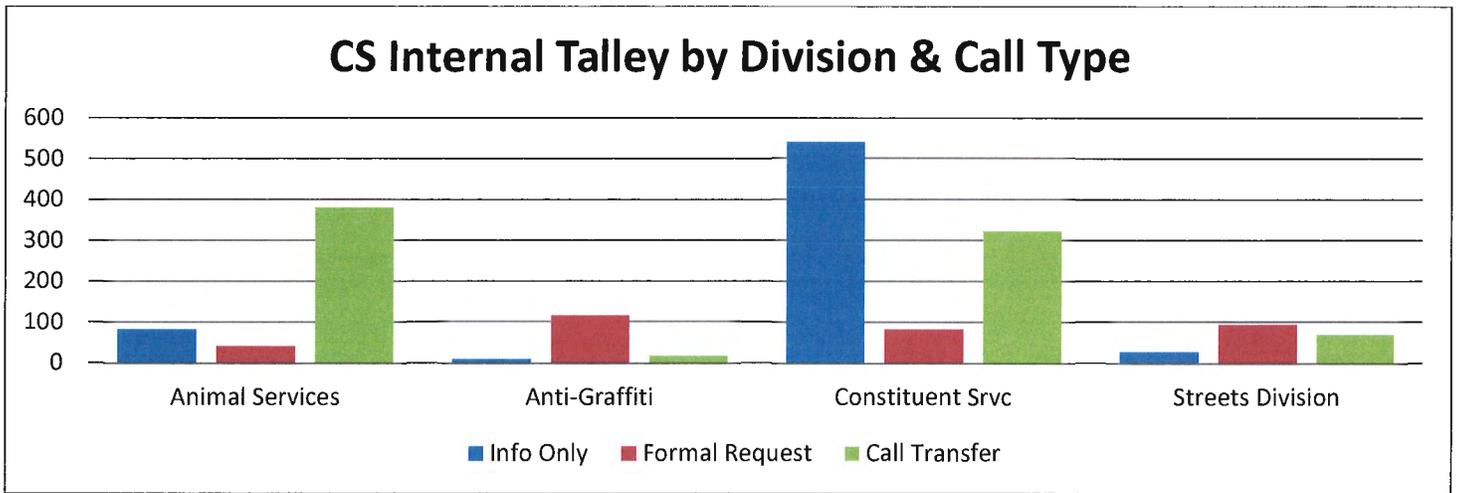
These numbers represent the additional call volume made or received by Constituent Services staff on their direct phone extensions. Please note, most of these calls pertain to the pilot areas while other calls are related to other city services.

- Inbound/Outbound Calls: 4,229
- Avg Talk Time: 0:01:28

Constituent Services Independent Internal Talley

Count by Division/Section and Call Type (Information Only, Formal Requests, and Call Transfer). Please note, the discrepancy in the total is due to the fact that we started collecting this data two (2) weeks after we started the pilot project.

Division/Section	Total Count	Info Only	Formal Request	Call Transfer
Animal Services	506	83	43	380
Constituent Srvc	947	540	84	323
Anti-Graffiti	146	11	116	19
Streets Division	194	29	94	71
Totals	1,793	663	337	793

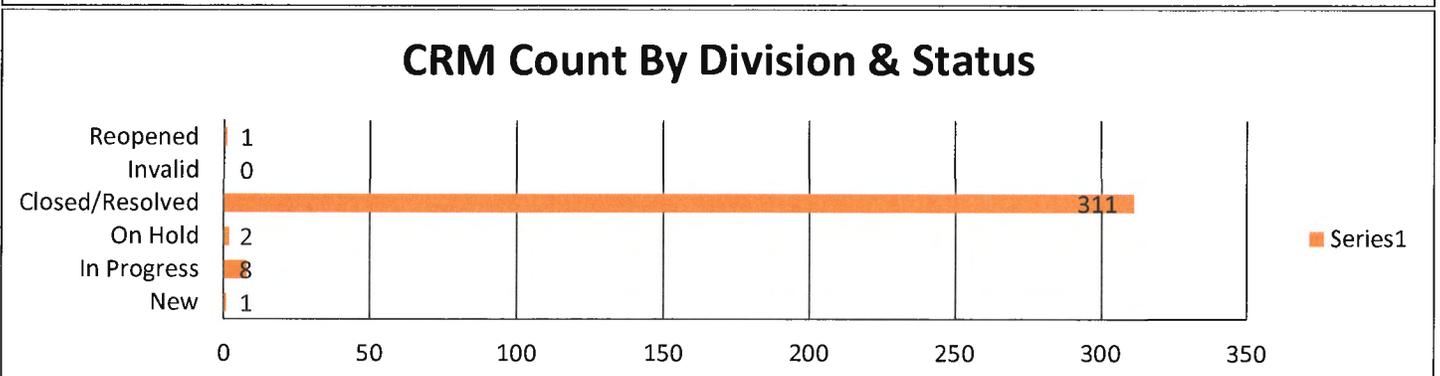
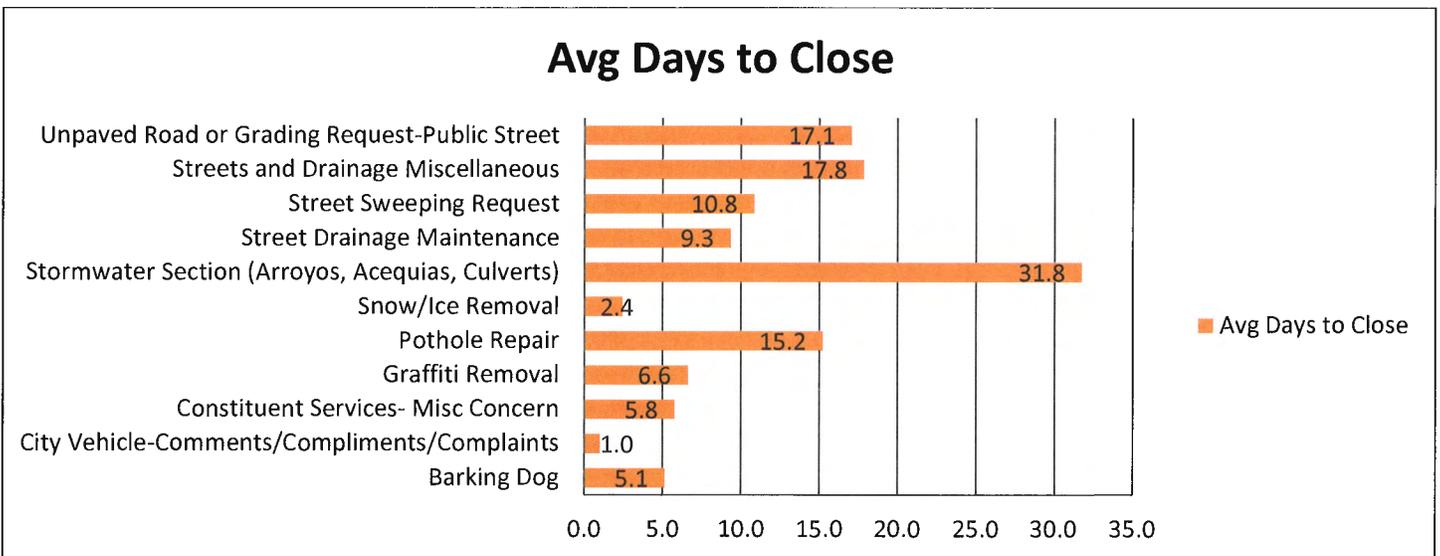


Please note: The footer of the City’s website is static throughout the site and lists Constituent Services’ phone number under Contact Us. As a result, three hundred twenty-three callers requested to be transferred to a specific staff person.

City of Santa Fe Customer Relationship Management (CRM) System Statistics

An analysis of our CRM system identifies that, during the 12-week pilot project, three hundred twenty-three (323) formal requests were entered. Please note that the CRM system is available online where a member of the general public can enter their requests independently; in addition all city users also have access to enter request as well. The current status of these requests is as follows:

Request Type	Count	New	In Progress	On Hold	Closed Resolved	Reopened	Avg Days to Close
Barking Dog	44	0	0	0	43	1	5.1
City Vehicle-Comments/Compliments/Complaints	4	0	0	0	4	0	1.0
Constituent Services- Misc Concern	22	0	0	0	22	0	5.8
Graffiti Removal	136	0	1	1	134	0	6.6
Pothole Repair	42	0	1	0	41	0	15.2
Snow/Ice Removal	9	0	0	0	9	0	2.4
Stormwater Section (Arroyos, Acequias, Culverts)	5	0	0	1	4	0	31.8
Street Drainage Maintenance	4	1	0	0	3	0	9.3
Street Sweeping Request	19	0	0	0	19	0	10.8
Streets and Drainage Miscellaneous	18	0	5	0	13	0	17.8
Unpaved Road or Grading Request-Public Street	20	0	1	0	19	0	17.1
Total Requests	323	1	8	2	311	1	11.2



What have we learned?

We are not ready to move from a small pilot project to a citywide deployment of a 311 non-emergency call center however, the benefit of a systematic approach to improving customer service has merit. In order to deliver the high level of successful and efficient services as suggested in the 2014 Quality New Mexico Feedback Report, there is much internal work that needs to be accomplished. Below is a snapshot of the existing challenges and limitations.

Citywide Customer Service Inquire/Service Request Administrative Policy/Procedure

The City of Santa Fe does not currently have a citywide administrative policy/procedure that establishes:

- The expectation for staff when responding to constituent complaints and/or requests.
- A systematic approach for ensuring prompt and effective resolution of customer complaints and/or request for services.
- One citywide Constituent Relationship Management (CRM) system to be used by all staff.
- The data that will be collected, reviewed and analyzed for critical performance measurements and assist with:
 - Short and long term planning;
 - Organizational decision making process; and
 - A continuous internal employee education, development, and training program.

Website

In this day and age of internet accessibility through smartphones and mobile devices, immediate access to information and services has become a critical component in the delivery of customer service for successful local governments. It is critical that we make a stronger commitment to maintain and update of our website daily. If we, as employees, cannot find the information on our own website, how can our customers? Cities across the nation that have implemented 311 non-emergency call centers are using their website as their main information source to provide accurate and reliable information regarding all the services they provide.

The content on our City's website is in major need of review, editing and streamlining. The currently layout of our website is organized primarily in a department orientation rather than a service orientation which makes it difficult to navigate. There are too many pages with no consistency to the look and feel from page to page, (e.g. department landing pages, contact information, mission statements, committee agendas, links, the use of bold and underline text, the use of buttons and online forms, etc.); some pages have too much text while others have too many technical terms. The city does not have a style guide.

Currently, there are over two thousand one hundred and thirty-two (2,132) web pages on our website; this does not include the categories for database content sections. In addition, there are ten thousand five hundred and seventy-nine (10,579) items in the archive center and two thousand six hundred and thirty-six (2,636) items in the document center.

There is not one single person on City's staff who is responsible for overseeing the content of our website. The website content is currently managed individually by Department / Division Directors, Office Mangers, Administrative Assistants or Secretaries, and/or anyone within the division who has knowledge of websites. It is believed that this has contributed to the challenges we are currently experiencing. It has been reported that when departments / divisions recruit new staffers, they are recruiting for specific existing staff needs (e.g. Office Mangers, Administrative Assistants or Secretaries, Account Technicians, Engineers, Planners, Field Inspectors, etc.) not web content managers, webmasters, social media experts or anyone solely dedicated to manage their webpages. This is probably due to the fact that the City has not, until recently, utilized our website to its potential and / or realized the immeasurable benefit that a fully developed website can bring to our day-to-day work experience. Additionally, staffing each department / division with a full-time web content manager would not be feasible financially - there is not enough work, however, looking at our organization as a whole there is plenty of work for one (and possibly even two) full-time positions to serve the entire City. The City has never had a dedicated staff person to oversee and manage the content on our website.

Constituent Relationship Management (CRM) System

One of the main goals of this Governing Body and this administration is to implement a citywide 311 non-emergency call center in an effort to: improve the overall customer experience with the City of Santa Fe; improve the delivery of public safety, core and quality of life services; operate more efficiently and effectively. More importantly, as recommended in the 2014 Quality New Mexico Feedback Report, to develop a systematic approach to how our customers interact with their elected officials, local government and how we, as public servants, provide the best possible customer service by collecting, reviewing and analyzing critical data. This can be accomplished by using one citywide CRM system, however in order for this to be successful it is imperative that the Governing Body, City Manager and department heads fully embrace and commit to this new way of doing business and support existing and newly developed policies, procedures and work flow processes.

The current CRM system was designed by Desert Elements following the scope of services and the functionality of the previous CRM system (Civic Plus's Request Tracker). As with any custom designed application, it is typical to experience some system bugs, limitations and challenges. It had been reported by constituents, business owners that the system is not user-friendly and that it is too slow and confusing to navigate. Staff has also identified several bugs, challenges and limitations. Staff has worked closely with Desert Elements to identify the problems, prioritize the needs and resolve critical items. The CRM system is fully operational and available to the public through our website (Report and Request). To date, there are ninety-six (96) city staff users and over ten thousand seven hundred (10,700) requests have been entered; seven thousand two hundred and eleven (7,211) of those are internal work orders for Environmental Services (this is their internal work order system).

Staff has worked with Desert Element to address the following critical items:

- Email confirmation upon successful submission;
- Email notifications upon request status change of updates entered;
- Notifications include summary of request when check-marked;
- Source field accuracy;
- Back-end user permission; and
- System and search speed.

As we continue to develop a systematic approach to implementing a city wide 311 non-emergency call center there are several cost factors to take into consideration, including the development and improvement of the current CRM system. During the pilot, staff was contacted by several CRM software developers notion wide; staff demoed most of these CRM solutions in an effort to have a full understanding of the available CRM software solutions used by other cities across the country.

Some of the pending functionality/features that need to be implemented or changed are:

- Customer history to be searchable with an option to select and add a new request'
- Document upload at the point of entry;
- Add City Council Districts and requests to maps;
- Add a Previous/Next option in the View/Search screen;
- Require notes for Staff Reassignment;
- Associate similar requests reported by multiple constituent;
- Associate multiple request similar requests in a group;
- Improve/Simplify reporting capabilities:
 - Develop monthly statistical/analytical report templates to run automatically;
 - Generate a monthly report that is emailed directly from system to the Governing Body;
- Improve search speed and functionality;
- Improve notification layout;
- Improve mobile accessibility; and
- Integration with other city systems;

Division – Internal Policy/Procedures

We have learned that Streets, Animal Services and Anti-Graffiti have their own independent internal tracking systems; two of which are individualized Microsoft Access databases and one is on the city's network – HTE system (Auto CAD). As a result, there is a large amount of work duplication.

During the pilot, service requests were received using a variety of communication systems (e.g. in person, phone calls, email, CRM, USPS letters). Requests were primarily entered by Constituent Services staff; please note, that all staff members with access to the CRM system have the ability to enter requests as well. Once the CRM request is received by the appropriate division a supervisor or an administrative support staff re-enters the request into their internal system. It is then reviewed, categorized and prioritized according to their current work flow processes; a work order is then created and assigned to the appropriate staff. The CRM system has the ability to email updates to the requestor, as a result staff is directed to enter their updates to each request while the case is in progress. The status will remain at "New" or "In Progress" until the request has been completed at which time staff will add closing comments and close the request. Please note, the status of a request must be changed manually.

In regards to communication across our organization

Requests that require assistance from other City departments are typically coordinated by supervisors or division directors in an effort to maximize efficiencies.

In regards to customer follow-up

It has been reported that due to a lack of a Citywide Customer Service Inquire/Service Request Administrative Policy/Procedure and often times because of existing workloads, customers are not receiving a follow up communication from assigned staff after their request has been completed; call backs are by request only. In instances where additional information is needed, staff will contact the requestor as long as the requestor provide his/her contact information.

Can Constituent Services handle the current call volume with existing staff?

Calculating call center staffing needs can be very challenging in that the workload does not represent typical work patterns i.e. repetitive tasks, back to back tasks. In a call center, the workload is not back to back tasks; the work arrives whenever our customers decide to call; a random workload. Upon staff's research, there are several telephone traffic engineering models available, however the model called Erlang C takes into account the randomness of incoming calls in a call center workload as well as the queuing behavior (holding for the first available rep) of the calls.

Our goal is to answer ninety percent (90%) of all calls within twelve (12) seconds. After evaluating the collected data from the pilot project, reviewing the job duties assigned to the existing Constituent Services staff members and using the Erlang C formula we can manage the current call volume for the three divisions (Streets, Animal Services & Anti-Graffiti); however as additional phone lines are routed into Constituent Services and the call volume increases more staff will be needed.

Objectives for this Current Fiscal Year (15/16)

Citywide Customer Service Inquire/Service Request Administrative Policy/Procedure

Staff will work with the City Manager to develop and implement a Citywide Customer Service Inquire/Service Request Administrative Policy/Procedure to be approved by the City Manager, disseminated to all city employees. Staff will work with the City's Training Administrator to develop and administer a training program. In addition, staff will also work with the Human Resources' Department Director to include this new administrative policy/procedure in the "New Employee Orientation" and add it to the City's Personnel Rules and Regulations.

Website

Staff will be working with the City Manager to explore the possibility of reclassifying an existing vacant position to create a Web Content Managing Editor position. This position would be responsible for overseeing and managing the content and branding for the City's website; ensuring the quality and accuracy of web content; editing and evaluating material submitted for publication; planning overall and individual page layouts and navigation. This position would also be

responsible for monitoring the website analytics and usability reports daily for greater efficiencies, ensuring optimal reliability and identifying trends. Furthermore, this position would also be responsible for developing policies, procedures, a style guide and staff training for the website.

Staff will also be working with the City Manager to create an internal Web Governance Committee which will be made up of the Web Content Managing Editor, Public Information Officer, Constituent Services Division Director, ITT Department Director or his/her designee and additional staff representatives from the following departments: Public Works, Transportation and Public Utilities.

N11 (311) Phone Number

Staff will be working with Century Link and in an effort to finalize and execute the N11 Contract to secure the N11 (311) phone number for the City of Santa Fe with the understanding that it will not be activated until such time we are ready.

New Constituent Relationship Management (CRM) System

Staff will continue to work with Desert Elements to ensure the full functionality and reliability of the current CRM system. Staff will also work closely with the City Manager, City's Purchasing Director and IT Department Director to develop a comprehensive RFP in an effort to explore all new innovative technologies with respect to 311 non-emergency call centers, constituent relationship management (CRM) systems, mobile application integration, and integration with other databases, user interface, simplicity and functionality.

Objectives for FY 16/17 Budget Review/Approval

- Work with IT to monitor and analyze additional telephone lines.
- Work with IT and departments/divisions to determine additional technological needs.
- Work with benchmark cities and industry professional regarding industry best practices.
- Analyze/develop workload, staffing needs and hours of operation.
- Finalize the projected cost of a new CRM system.
- Develop a systematic implementation for a city wide 311 non-emergency call center.
- Develop an internal standard operation procedure manual.
- Develop an ongoing city wide CRM training program.

Staff is projecting that this groundwork work can be completed within the next seven (7) to ten (10) months provided we are able to hire a Website Content Manager. Our goal is to monitor and analyze the progress the FY 15/16 objectives and develop a realistic FY 16/17 budget for the implementation of a citywide 311 non-emergency call center.