



The City of San Diego

## REPORT TO THE CITY COUNCIL

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DATE ISSUED: September 10, 2007 REPORT NO: 07-143

ATTENTION: Public Safety & Neighborhood Services  
Agenda of Sept. 12, 2007

SUBJECT: Quarterly Report on Constituent Services  
Fiscal Year 07, Quarter 4, from April through June, 2007

### SUMMARY

THIS IS AN INFORMATION ITEM ONLY. NO ACTION IS REQUIRED ON THE PART OF THE COMMITTEE OR THE CITY COUNCIL.

### BACKGROUND

In October of 2005, it was recommended that the Mayor's Office and Citizens' Assistance provide a quarterly report on constituent services. Since that time, Citizens' Assistance has become part of the larger Department of Customer Services, and the objective of these quarterly reports has become to provide a comprehensive account of the status of customer service improvement initiatives in the organization. This report constitutes the third quarterly report on the status of these items, and represents a rolling log of projects that have been completed to date, and those that are planned. Items reported as completed in previous quarters are not duplicated in this report.

This quarterly report includes information on:

- ◆ Customer services initiatives and training accomplishments completed during the Fiscal Year 07 Quarter 4, from April through June, 2007,
- ◆ A status of citizen concerns submitted to the organization via Route Slips during that period, and improvements to the Route Slip process,
- ◆ Information on direct customer assistance via the six Community Service Center locations, and
- ◆ The customer service initiatives planned for upcoming quarters.

### DISCUSSION

We all have different functions in our organization. Some people staff public counters, some fix water pipes in the field, some fight fires, some run departments. Whatever our function is, great customer service is how we do what we do each day. It is how we can make a positive impression on both our internal and external customers during every single interaction.

The Customer Services Department was established in early 2006. One of our responsibilities is to create and deploy programs that will support all the City employees

in their efforts to provide World-Class Services to our customers. To help us in those efforts, there is a Customer Service Liaison Network, with representatives from all of the departments.

### **Customer Services Initiatives and Training Activities**

During this quarter, the Customer Services Department, with support from the other City departments, and the Customer Services Liaison Network, have completed the following projects.

- Analysis of the [Citywide Customer Satisfaction Survey](#) (March 07) data
- Deployment of [CityNet](#) and [external Customer Services Department](#) web pages
- [Customer Service Tip of the Month](#)
- Assistance with coordination of telephony systems
- Additional detailed best practices service standards
  - Supervisor's Tip Sheets
    - [Improving Internal Service to Employees](#)
    - [Ways to Reward People that Don't Cost Money](#)
  - [City's Octel Phone System Tips](#)
  - [Out of Office Tips](#)
  - [Driving Etiquette Tips](#)
- [Customer Service Summit Updates](#)
- [Ken Blanchard-developed Customer Focused Culture Training Series](#)
- [Customer Services Skill Building Sessions](#)

### Citywide Customer Satisfaction Survey

The Citywide Customer Satisfaction Survey was conducted from March 19 through March 29, 2007. Surveys were placed on public counters, and customers visiting offices were invited to provide their thoughts on the service they received. Surveys were printed double-sided, and were available in both English and Spanish.

Information was gathered from these direct contacts about the following key indicators of the quality of service delivery.

- ◆ Promptness of initial greeting
- ◆ Courtesy of staff
- ◆ Knowledge of staff
- ◆ Receipt of requested information
- ◆ Promptness of resolution of the situation
- ◆ Caring service
- ◆ Overall satisfaction with the experience at that location

These indicators were chosen as the core components of great service emphasized in both the City's expectations of great service, and in customer services skills training provided to City staff by the Customer Services Department. The first six items are also directly actionable by departments, so they may continue to improve our customers' satisfaction with the quality of service we provide.

In general, most departments received their highest rating on the key indicator of staff courtesy. The lowest ratings were received in the areas of customers being greeted promptly, and in the perception that a resolution to the issue was prompt. Both of these items will be reemphasized through training and through continued business process

reengineering. Additional details on the results of the Survey appear in Attachments 1 and 2: *Citywide Customer Satisfaction Survey Results* and *Fact Sheet - Mayor Sanders Releases Results of Citywide Customer Satisfaction Survey*.

#### Deployment of CityNet and external Customer Services web pages

The Customer Services Department worked with the City's Web Team to develop and implement the Department's CityNet (internal) and [www.Sandiego.gov](http://www.Sandiego.gov) (external) websites, which were fully launched in April 2007. Both sites are updated and maintained regularly, and new information is generally posted at least once a week.

The CityNet site was designed as a resource for City staff, and provides information on customer service training sessions, customer service tips, and customer service best practices. Also, the site provides information about the various programs within the Department, including the Community Service Centers, Citizens' Assistance, and Citywide Training. The site also contains updates on Department projects such as the Customer Service Summit, the Customer Service Liaison Network (CSLN), and all Department issued reports.

The [www.Sandiego.gov](http://www.Sandiego.gov) site was designed to help external visitors find answers to the most frequently asked questions about City services and processes. Such items include paying a water bill, public notices, finding City documentation, and making service requests. The site also provides updates on Department related projects.

#### Customer Service Tip of the Month

Each month, a tip is posted under "News and Announcements" on the Customer Services CityNet web site. These tips are designed to be quick informational items that will help all City employees make a great impression on every person, every day. The Tip of the Month for August, 2007 was "Creating a Customer-Focused Voicemail", and the tip for September 2007 is "Recognizing Great Service in Others."

#### Assistance with coordination of telephony systems

The Customer Services Department, in cooperation with City IT Management and San Diego Data Processing Corp, has led efforts to issue a Request for Proposal (RFP) to replace our aging telephony systems with an update of both hardware and software. The RFP garnered responses from industry leaders, each proposing methods for replacing current City systems with an eye towards enabling future enhancements, such as voice recognition. Finalists have each provided a 4-hour demonstration/presentation of their proposals, and during the month of August, references will be checked. It is anticipated that a contract will be awarded to a final vendor in September/October 2007.

#### Additional detailed best practices service standards

A crucial step in ensuring that every customer interaction that we have is a positive one, is defining Citywide best practices in customer service. In the previous quarter, the Customer Services Department created several tip sheets that provided more details about the best practices during various customer interactions. These include contact in person, over the phone, or via email.

In addition to these standards, the Department has outlined best practices service standard guides for supervisors, which include [Improving Internal Service to Employees](#) and [Ways](#)

[to Reward People that Don't Cost Money](#). The Department has also created additional customer service tip sheets.

- City's Octel Phone System Tips
- Out of Office Tips
- Driving Etiquette Tips

All of these guidelines and tips are distributed at various training sessions, and are available on the [Customer Services Department CityNet](#) website.

#### Customer Service Summit Updates

On March 15, 2007, almost 300 people dedicated the day to focusing on how best to deliver services, specifically "what does great service look like?" for the City of San Diego, and "what can we do to improve the way we do what we do everyday"?

The attendees included staff representing every level of the organization, and external customers known for their leadership, creativity, and emphasis on great service in their own businesses. Our activities at the Summit centered on how we do things versus the services or programs themselves. From this Summit, the City's Customer Service Vision Statement was developed.

*America's Finest Service for America's Finest City*

Attachment 3 is an update of the Summit-related projects. These updates are posted regularly on the Customer Services web sites, for both our internal and external customers at <http://citynet/customerservices/pdf/070731summit.pdf>. The top projects being tracked include:

- Create a customer Bill of Rights
- Train and Empower Employees
- Launch a media campaign highlighting City employees doing good work/deeds
- Establish a call center for citizen concerns
- Implement a Citywide Customer Satisfaction Survey
- Encourage teamwork between management and employees
- Focus on Rewards and Recognition
- Customer Service performance measures
- Improve websites
- Improve telephone system
- Support Citywide volunteers

In addition, many projects are being completed jointly with Human Resources and Personnel staff. For example, a line item has been written to be added on every employment announcement about the expectation of great service from all employees. The draft reads "*The City of San Diego expects all City employees to provide "America's Finest Service for America's Finest City" by being courteous, knowledgeable, and prompt in all the services we provide to both internal and external customers.*"

#### Ken Blanchard-developed Customer Focused Culture Training Series

The Customer Services Department worked closely with the Ken Blanchard Companies to create a customized series of four training classes, entitled "Customer Focused

Culture: Creating Legendary Service®.” This series of trainings is comprised of four two-hour modules and includes one class designed specifically for front-line service providers, one for managers & supervisors, and two general sessions for all City employees. The trainings are designed to strengthen the City’s culture of service by giving employees the skills and information they need to provide our customers with Legendary Service®.

In May, the Customer Services Department sent out an invitation for volunteers to become trainers for the Blanchard Legendary Service® courses. In June, 16 employees, representing a range of departments and functions, completed five days of intensive train-the-trainer classes, facilitated by a Ken Blanchard Companies consultant. The 16 volunteer City trainers also spent one day training with the Blanchard Company consultant who facilitated the Customer Service Summit, learning how to apply large group techniques to the customer service culture trainings, which were originally designed for the smaller class-sized groups. These trainers will deliver the Legendary Service® courses to all City employees in the next two-to-three years.

We are conducting a Legendary Service® training pilot in the Customer Services Department this summer. Citywide implementation of this training is expected to begin in October 2007, with a formal kickoff on September 17 at the Executive Team meeting. Deployment of this training has also been coordinated with Union leaders through the Labor Relations Office. A memo to the Directors, with a copy to Citywide training staff, the 16 volunteer trainers, and the Customer Service Liaison Network membership will follow. That memo will outline the opportunities to receive this training, and the procedure for doing so.

In an effort to train as many employees as quickly as possible, with the least impact to current work loads, the training will be offered in a variety of forms. Departments may choose to have their trainings in a classroom setting with groups of 25-30 employees. We also plan to offer these trainings in a large-group format for up to 200 participants. These will be open sessions, to allow for coverage during attendance.

#### Customer Service Skills Based Training

One of the Customer Service Department’s responsibilities is to create and deploy programs that will support all the City employees in their efforts to provide World-Class Services to our customers.

To that end, the Customer Services Department has implemented a series of customer service skill-building trainings. Topics include:

- Assisting angry or difficult customers, both in person and on the phone
- Writing customer-focused correspondences and e-mails
- Serving people with physical disabilities
- Teamwork and customer service
- Customer service and supervisors

Attachment 4 is a [list of courses](#) with more detailed information on each course offered.

City departments and employees have been very supportive of the Customer Service Initiative projects, and have been pro-active in requesting training sessions. In this quarter, we provided more than 20 customer service skills trainings for staff throughout

the organization. A total of approximately 400 people were trained during these classes. These trainings were held in an interactive classroom setting, with class sizes limited to a maximum of 25 attendees in order to provide a high-quality learning environment for participants. The City Treasurer led this activity this quarter, requesting two full days of four-hour sessions in which we delivered customer service skills training to the entire Department staff (over 120 employees).

### **Route Slips**

Route Slips are concerns or requests for services received by the Mayor or City Council. The Route Slip program was developed to provide a centralized mechanism for these concerns to be quickly routed to City staff for resolution. Route Slips are coordinated by the Citizens' Assistance Program of the Customer Services Department, and are sent to the responsible departments for citizen follow up and resolution. Route Slips represent a portion of the service requests that a department may be resolving at any given time. Often, inquiries and requests are submitted to the departments directly by the citizen, as opposed to first being submitted to an elected official, and then routed to the department as part of this Route Slip process.

The Route Slip process uses an electronic application called CompleteGov. This system provides Council members the ability to electronically forward and monitor constituent issues, and receive responses to those issues. It also allows examination of the types and numbers of concerns being received in any given time period.

For the reporting period April 1 through June 30, 2007, 482 Route Slips were generated. This represents an increase of 92 Route Slips from the previous quarter. We have not been tracking Route Slips in this manner long enough to propose a reason for this change (i.e. seasonal decline, etc.).

The eight most common issues raised by constituents over this quarter include Code Violations (13%), Potholes/Street Resurfacing (12%), Traffic Calming Measures (7%), Weeds/Trees (7%), Sidewalks & Curbs (6%), Street Light (6%), Trash Debris (6%), Other<sup>1</sup> (6%). These categories are the eight highest volume Route Slip categories and have remained the same highest categories each FY '07 quarter.

This report concludes a full year of tracking Route Slips. The total number of Route Slips generated for fiscal year 2007 is 2074.

In addition, this past quarter we implemented an "interim" letter. This communication is sent to the requestor (customer) within seven days of receipt of the Route Slip. Departments were trained last quarter on the interim response process. As you can see from the chart below, the mode of days until closure is seven days. In half of the project categories, closure occurred within those seven days. This could mean that departments have been able to close many of the Route Slips with the interim response, thereby quickening responses to customers and closure of inquiries. The interim response, which includes:

- the department working on their concern,
- a contact person and phone number, and
- the date by which they expect the concern to be addressed,

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<sup>1</sup> The category of "Other" includes questions about current events such as the floating billboard boats, helicopter, or items that require a response but are not reoccurring questions.

improves the quality of the service to our customers and reduces the number of repeat phone calls.

A pilot project is currently underway to enhance the Route Slip process. The project includes the ability for the Mayor and Council Office to view the response electronically within the CompleteGov system, eventually eliminating the need to scan documents, and send emails to the Council Office. With the new process, the Mayor and Council Office will be notified that the interim communication has been completed, or the response has been completed.

Table 1: Current Quarter: Route Slip Breakdown (April 1, 2007 through July 31, 2007)

<b>Concern/Request Category</b>	<b>Number of cases during this time period</b>	<b>Average Number of Days Until closure</b>	<b>Mode of Days until closure</b>
Code Violations	63	21	7
Potholes/Resurfacing	59	13	7
Traffic Calming Measures	35	19	20
Weeds/Trees	35	19	20
Trash/Debris	31	18	20
Other <sup>1</sup>	30	21	7
Street Light	29	29	26
Sidewalk/Curbs	29	18	7

Table 2: Previous Quarter: Route Slip Breakdown (January 1, 2007 through March 31, 2007)

<b>Concern/Request Category</b>	<b>Number of cases during this time period</b>	<b>Average Number of Days Until closure</b>	<b>Mode of Days until closure</b>
Potholes/Resurfacing	59	17	14
Street Light	36	17	14
Code Violations	32	20	20
Traffic Calming Measures	30	28	25
Sidewalk/Curbs	20	20	14
Other <sup>2</sup>	19	21	14
Trash/Debris	13	15	14
Weeds/Trees	11	18	14

In addition to Route Slips, Citizens' Assistance also maintains the Information Resource Directory (IRD). This is an electronic tool that can be accessed via CityNet or the Internet. The purpose is to assist in locating frequently called numbers. By entering a topic, the user also will be able to access the phone number and/or the address. This quarter we are working on including a field for websites. The Information Resource Directory is available at <http://www.sandiego.gov/citizensassistance/resource.shtml>.

<sup>2</sup> The category of "Other" includes questions about current events such as the Rock 'n Roll Marathon, the Charger ticket guarantee, or items that require a response but are not reoccurring questions.

### **Community Service Centers**

The Community Service Center Program continues to provide a critical link between City Government and City customers throughout the Region. The benefits of the Community Service Centers are numerous:

- ◆ Decentralizes services in accessible locations around the large geographic region of the City of San Diego
- ◆ Improves community input
- ◆ Provides direct access in communities for Department staff offering services
- ◆ Provides direct access in communities for elected officials
- ◆ Provides direct access in communities for targeted programs and services
- ◆ Provides synergy with non-profits improving quality of life for customers
- ◆ Improves accessibility to government services – hours and locations
- ◆ Successful at cutting through red tape to get things done for community
- ◆ Advocates for under served communities
- ◆ Supports a friendly, caring approach to government, improving the perception in general – personal touch
- ◆ Improves trust in the City

There are currently six community service center locations located throughout the City, all providing residents with convenient access to City services. Each center provides core services. Some of those services include: water/sewer bill payments, passport application processing, City job applications, payment of parking citations, payment of business tax applications, and non-structural building permits.

From April 1, 2007 to June 30, 2007, the Community Service Center Program processed a total of 28,734 customer transactions. The table below shows some of the different types of transactions processed during this period.

<b>Service Provided</b>	<b>Number of Transactions</b>
Water/Sewer Bills Payments Accepted	14,834
Passport Applications Processed	1915
Business Tax Certificates	496
Parking Citations	576
Personnel Applications Accepted	171
Community Room Meetings Held	345
Residential “E” Parking Permits	482
Employee Transit Passes	269

In June 2007, the Customer Services Department examined the history of the program, and created an action plan for moving these activities into the future. The entire program staff, prior staff, and members of customer departments, were involved in the two half-day workshops. As a team, we looked at how we could make changes that would benefit all of our major customer groups - management, internal customers, and external

customers. The purpose of the exercise was to examine the Community Service Centers' effectiveness and viability, and to develop ways to propel the program next level of service. During this process, many more "value-adds" were identified, and an action plan is being developed so that they too may be added to the benefit list above.

### **Upcoming activities**

In addition to the activities previously described, there are several new projects in the works. All of these projects share the same goal, and that is to support "America's Finest Service for America's Finest City."

- Outstanding Customer Service Employees Event. Each year, the City recognizes the top 1% of its employees who go above and beyond to provide exceptional customer service. Approximately 100 employees are honored at a luncheon award event, coordinated by the Customer Services Department, where employees receive their award certificate from the Mayor.

This year's event will be held on October 5, in conjunction with National Customer Service Week. The theme for National Customer Service Week 2007 is "Connecting with Customers." We look forward to celebrating the City employees who work hard to make San Diego a great place to live and work.

- Sexual Harassment Prevention Training. California State law requires that every City employee who manages or supervises staff must complete two hours of sexual harassment prevention training every two years. The City met this requirement in 2005 by providing a computer-based on-line training through Brightline Compliance. Brightline will also provide the training for 2007. We plan to begin the sexual harassment prevention training in October 2007.
- Customer Services Tactical Plan. The Department has created a three year tactical plan for implementing the key projects identified in each of our internal program areas: Customer Service Initiatives, Training, Route Slips/Citizens' Assistance, and the Community Service Centers. Our goals and objectives are outlined, and lead staff/proposed start dates have been identified.
- Rewards and Recognition Task Force. Customer Services was asked to take the lead in chairing a Citywide Reward and Recognition Task Force. While some departments have well established, formally documented, programs in place, others have informal programs, and still others have no program at all. Some rely on awarding discretionary leave due to a lack of funds. This creates inconsistencies and a "haves" and "have-nots" environment.

The Rewards and Recognition Task Force was asked to review existing departmental Rewards and Recognition Programs (R&RP) and Administrative Regulation 95.91 "Employee Recognition and Awards Program", and propose new and innovative ways to reward employees. The findings will be forwarded as recommendations to the Executive Team for policy revisions. The primary goal is to design a fair, consistent Citywide program that provides a variety of options for departments to reward employees in a meaningful and cost effective manner. The final report recommendations are due on September 30, 2007.

CONCLUSION

Providing superior quality customer service benefits City employees, the customers of the organization, and the organization itself. Each time a staff member interacts with someone else, internal or external to the City, that person forms an opinion about this organization. We have the opportunity, in each of these moments of truth, to influence the lasting impression of each person.

The objective of providing World-Class Service is a catalyst to meet our “One City” vision. The Customer Services Department provides an umbrella program for the City, and supports staffs’ efforts to provide service within a strong and consistent framework of quality delivery. Customer service is how you choose to do your job every day. Organizational guidelines, training, surveys, recognition programs, and improving processes (i.e. Interim Route Slip letter) continue to shift the focus for our customers from “service silos” to the “One City” model.

The Customer Services Department will achieve success with these efforts with the continued support and hard work of the City employees and the Customer Service Liaison Network. We will continue to connect the dots between the needs of the citizens, the services provided by local government, and the high quality service delivery goals of World-Class organizations.

FISCAL CONSIDERATIONS: N/A

PREVIOUS COUNCIL and/or COMMITTEE ACTION: June 15, 2005, City Council Transition Committee, Subject Constituent Services; January 25, 2007 Public Safety & Neighborhood Services, Quarterly Report on Constituent Services.

COMMUNITY PARTICIPATION AND PUBLIC OUTREACH EFFORTS: March 15, 2007 Customer Service Summit; June 26, 2007 Customer Service External Committee Meeting,

KEY STAKEHOLDERS AND PROJECTED IMPACTS: Citizens and Employees.

Respectfully Submitted,

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Customer Services Director

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Assistant Chief Operating Officer

- Attachments: 1) [Citywide Customer Satisfaction Survey Results: March 2007](#)  
2) [Fact Sheet - Mayor Sanders Releases Results of Citywide Customer Satisfaction Survey](#)  
3) [2007 Customer Service Summit Recommendations and Updates](#)  
4) [Customer Service Training Modules: Series 1](#)

