

## 311 GUIDING COALITION FINAL REPORT

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### EXECUTIVE SUMMARY

This report is the final update on the 311 response to citizen service requests project that resulted from Notice of Motion 2012-29 (NM2012-29). As per Council direction, this report provides a summary of the work completed to date and next steps for anticipated deliverables moving forward. Work has focused on increasing accountability, citizen centricity, and overall efficiency and availability of City service requests online. Future reporting on this initiative will be done through the newly-formed Customer Service Steering Committee.

### ADMINISTRATION RECOMMENDATION(S)

That the Standing Policy Committee on Utilities and Corporate Services recommends that Council:

1. Approve the 2014 workplan and include it in the Customer Service Steering Committee scope of work;
2. Direct Administration to draft a terms of reference for the Customer Service Steering Committee and report back to ALT no later than 2014 January.

### RECOMMENDATION OF THE SPC ON UTILITIES AND CORPORATE SERVICES, DATED 2013 DECEMBER 11:

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That the Administration Recommendations contained in Report UCS2013-0809 be approved.

### PREVIOUS COUNCIL DIRECTION / POLICY

On 2012 June 25, Council approved the recommendations from NM2012-29 and directed that a plan of action be developed to address citizen-centric solutions for City operations. With a focus on 311 service requests, the Notice of Motion's goals were to review and optimize processes for 311 customer service request completions, redefine response and work completion timelines/standards, automate data completion by field staff, activate all public 311 customer service requests on the web, and to create and sustain a consistent system of accountability for service delivery throughout all departments.

Council received update reports on 2013 February 11 (UCS2013-0027) and 2013 June 10 (UCS2013-0373). Council directed Administration to return to the Standing Policy Committee on Utilities and Corporate Services with a final report no later than 2013 December.

### BACKGROUND

The Administrative Leadership Team (ALT) formed the 311 Guiding Coalition (consisting of two General Managers, seven business unit Directors and supported by a project lead and 311 staff) to develop the strategies and recommendations in response to the Notice of Motion.

On 2013 February 11, Council approved the 311 Guiding Coalition's Plan of Action to respond to the Notice of Motion. The approved plan of action focused on:

1. **Self-serve tools for citizens**, which will increase the presence of 311 service requests on the web and enable the public to track the progress and status of service requests;
2. **Mayoral and Council access** to improve communication channels between the Mayoral/Councillor offices, Administration and the public;

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3. **Common terminology** to increase levels of understanding and to ensure clear and consistent language is used in all service channels;
4. **Technical integration** of City systems to provide customers with a consistently high level of service across all The City's lines of business; and
5. **Accountability framework** that will create a sustainable system of accountability and foster cooperation and continuous improvement.

On 2013 October 08, ALT approved the amalgamation of the 311 Guiding Coalition and Web Guiding Coalition to form a Customer Service Steering Committee to provide oversight and guidance to the ongoing 311, web and customer service initiatives.

### INVESTIGATION: ALTERNATIVES AND ANALYSIS

In alignment with the Plan of Action, the 311 Guiding Coalition has advanced the goals of the Notice of Motion by taking the following action:

#### Self-serve tools

Administration has made significant progress in moving service requests online. Since the passage of the Notice of Motion, 84 service request types have been added online, bringing the total number of online service request types online to 162. Attachment 1 shows the progression of service requests online from 2006 to the projected number in 2014.

The 311 Calgary mobile app was launched on 2013 May 07 with 17 service request types available to citizens. Since the launch six service request types have been added with another five currently under development. The mobile app provides citizens with another option to submit and track their service requests. There have been over 16,200 downloads of the app and over 8,600 service requests submitted through the app.

Citizens expect that they can contact The City through their preferred method. By making service requests available online and on a mobile app, 311 can focus their resources on providing excellent customer service through the call centre.

#### Mayoral and Council access

A pilot project is underway to test a process for allowing the Mayoral and Councillor Offices to inquire on previously submitted citizen service requests. The pilot will run in the Mayor's office and one Councillor's office. Full implementation is expected in early 2014.

#### Common Terminology

On 2013 May 27 the Plain Language Council Policy was approved by Council. The policy directs Administration to develop standards for plain language for communicating with citizens. A usability review auditing the 311 online service request system was completed with a panel of public evaluators. The usability review identified areas for improvement and recommended changes to improve the citizens' experience. Progress on implementing the recommendations is ongoing and will be completed early in 2014.

The 311 Guiding Coalition developed a three-step standardized process for service request resolution. The process change creates an opportunity for major improvements to the 311

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service request system in performance measurement, transparency, accountability and citizen centricity. The process uses consistent and understandable terminology and will follow these three steps: 1) Reviewed; 2) Work assigned; and 3) Completed. The process will be implemented starting in Q4 2013 and completed in 2015. See Attachment 1 for more details.

### **Technical Integration**

The Roads Business Unit has migrated the majority of their service request management into the Motorola CSR platform. This has allowed Roads to take full advantage of the Motorola CSR platform which includes improved reporting, mapping, online status updating and workflow management for multiple business unit issues. Roads has seen a decrease in escalations, shorter service request response times and better performance on meeting service level targets with the new system.

### **Accountability Framework**

The amalgamation of the 311 Guiding Coalition and the Web Guiding Coalition to form the Customer Service Steering Committee was approved by ALT on 2013 October 08. The new steering committee will provide guidance, direction and oversight to the ongoing 311 and web improvements. The new committee will allow for a broader more integrated approach to customer service improvements. The continuous improvement of the 311 system will be achieved with direction from the steering committee and will align the 311 improvements with the Corporate Customer Service Framework program.

### **Recommended 2014 Workplan**

The following items are to be carried forward and included in the Customer Service Steering Committee 2014 workplan:

- i) Terms of reference for the Customer Service Steering Committee will be developed and detail the goals, scope, procedures, and roles and responsibilities of the steering committee. This report recommends that a draft terms of reference be brought to ALT for approval no later than Q1 2014.
- ii) The performance measurement of 311 service requests will be included and aligned with the Customer Service Framework program and reporting. Customer service standards and measurement will be developed with guidance from the Customer Service Steering Committee in order to provide an overarching framework for measuring customer service delivery.
- iii) Continuing with the implementation of service requests online, there are 22 high-demand service request types planned to be launched online in 2014. A portion of the service requests going online will also go on the mobile app in 2014. Service requests that are most frequently accessed and provide high value to citizens will be the focus of future online and mobile app service requests (Attachment 1).
- iv) The implementation of the three-step service request process will begin in Q4 2013 and is scheduled to be completed in 2015 (see Attachment 2 for an implementation plan). The implementation of these changes will require review for any impacts to the current 311

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service level agreements. Included in this is further investigation into the technical integration between Motorola CSR and other business unit systems. Investigation will focus on short term and long term changes to the integration between the different systems.

- v) Following the pilot of the Mayoral and Council service request inquiry process, a full implementation will begin early in 2014.

#### **Stakeholder Engagement, Research and Communication**

Engagements were held with 311 subject matter experts from various business units to identify issues, opportunities, areas of improvement and potential impact to operations. Similar sessions were held with Councillor and Mayoral offices as well as the 311 Business Advisors.

In 2013 February, a usability review of the 311 online service request system was completed using general public participants as evaluators. The review identified areas for improvement and recommended changes to improve citizen experience.

#### **Strategic Alignment**

Overall, the NM2012-29 action plan supports and aligns with City policies and guiding documents.

Council's Fiscal Plan outlines the importance of becoming more effective as an organization by ensuring citizens are satisfied with the quality of the services they receive (Z7) and through increased accountability throughout the organization (Z10). NM2012-29's self-serve tools and accountability framework align and support this direction.

The 2012-2014 Business Plan and Budget includes strategies to improve delivery of quality customer-centric services (Strategy 4Z3) through actions such as Customer Service & Communications (CSC) partnering with other City business units to improve service delivery and outcomes for citizens (Z3.3). The NM2012-29 Guiding Coalition consists of nine members of the Senior Management Team who are working together to streamline 311 service requests in their respective departments, including CSC.

Additionally, the NM2012-29 action plan also aligns with imagineCALGARY's goal that Calgarians will feel government activity is open, honest, inclusive and responsive by 2016 and Transforming Government's principles of: accountability, transparency, innovation and citizen orientation.

#### **Social, Environmental, Economic (External)**

There are no current external social, environmental or economic impacts identified at this time.

#### **Financial Capacity**

##### **Current and Future Operating Budget:**

There is no impact to the current operating budget.

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### **Current and Future Capital Budget:**

Project management and technical configuration work will be funded through 311 Capital Program 793.

### **Risk Assessment**

There are no risks associated with this report.

### **REASON(S) FOR RECOMMENDATION(S):**

To provide Council with a final update on the 311 response to citizen service requests project that resulted from Notice of Motion 2012-29 (NM2012-29).

### **ATTACHMENT(S)**

1. 311 Service Request Statistics
2. Implementation of CSR Stages