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Information Item No. 2
Executive Standing Committee
November 2, 2015

TO: Chair and Members of Executive Standing Committee

ORIGINAL SIGNED

SUBMITTED BY:

Amanda Whitewood, CFO/Director – Finance and ICT

DATE: August 21, 2015

SUBJECT: 14/15 Q4 and Year End Citizen Service Requests Performance Report

INFORMATION REPORT

ORIGIN

One of the key performance measures for HRM is our response to Citizen Requests for Service. This report provides the Executive Committee with the 14/15 Q4 and Year End Summary Report on HRM's Response to Citizen Requests for Service.

LEGISLATIVE AUTHORITY

Council and Chief Administrative Officer relationship 34

(1) The Chief Administrative Officer is the head of the administrative branch of the government of the Municipality and is responsible to the Council for the proper administration of the affairs of the Municipality in accordance with the by-laws of the Municipality and the policies adopted by the Council.

Executive Standing Committee

Priority Areas and Corporate Performance Objectives of the Council

9. The Executive Standing Committee shall:

(a) have strategic oversight of progress on HRM's Corporate Performance Objectives and priority areas of the Council; and

(b) perform other Administrative matters as may be determined and directed by the Council.

BACKGROUND

In an effort to become a more Performance Managed Organization, staff are continuously evaluating performance measurement and reporting systems. As a public service, HRM's response to Citizen Requests for Service is a key performance measure for the organization.

DISCUSSION

Since 2002, the 311 Customer Contact Centre has served as the intake point for many municipal services. This central intake not only provides citizens with simple access to municipal services, but also provides an opportunity for Service Providers to access service request data at an aggregate level to monitor and respond to service demand trends.

Since its implementation in 2002, the Hansen Customer Relationship Management (CRM) system has undergone several enhancements to support better workflow, tracking and reporting. In 2013/14 a Project was initiated to renew the organization's commitment to consistent and standardized use of the CRM tool. That project was implemented in Q1 of the 14/15 Business Cycle and has resulted in a significant improvement in the quality and availability of Citizen Requests for service performance data.

The availability of this level of information will provide managers with better data to improve responses to service demands.

FINANCIAL IMPLICATIONS

There are no financial implications of this report.

COMMUNITY ENGAGEMENT

Citizen Requests for Service are an important mechanisms used by the Municipality to engage its citizens. Community engagement was not utilized in the development of this information report.

ATTACHMENTS

Attachment A - 2014-2015 Q4 and Year End Summary Citizen Service Request Performance Report

A copy of this report can be obtained online at <http://www.halifax.ca/commcoun/index.php> then choose the appropriate Community Council and meeting date, or by contacting the Office of the Municipal Clerk at 902.490.4210, or Fax 902.490.4208.

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Citizen Service Requests Performance Report

2014/15

**Year End Summary and
Q4 Results**

Compiled by:

Corporate Planning Office
Finance and ICT
June 2015

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OVERVIEW

The Citizen Service Request Performance Report measures the timeliness of HRM business units in addressing service requests from its citizens. This report provides summary level quarterly performance results for HRM overall as well as a breakdown of results within each business unit.

As this report is the final one of this fiscal year, a full year results summary is also provided.

Background

It has been a year since the CRM 2.014 Project completed. The goal of the project was to better support service excellence and continuous improvement related to the resolution of the citizen service requests.

The project:

- Reaffirmed established processes for complete and consistent handling of service requests within the Hansen CRM system;
- Provided updated performance reports to improve the availability of data for analysis and decision-making;
- Provided a clear organizational performance monitoring, reporting, and continuous improvement cycle; and
- Defined a quality assurance audit process to ensure that accurate, complete, high-quality data improvements were sustained.

This document is the third quarterly Citizen Service Request Performance Report to be issued since the CRM 2.014 project. Due to organizational change in October 2014, no Q2 report was prepared.

Progress

Over the past year, HRM Business Units have renewed their attention to timely resolution of citizen service requests resulting in incremental improvements in process and collaboration. There has been focus on assessment and closure, where appropriate, of older legacy requests resulting in the majority of these being addressed. Business Units are now in a much better position to start using the CRM data to understand service peaks and capacity issues.

Upcoming Year

To ensure continued progress, business units must embrace consistent reporting and more importantly analysis into performance issues and the development of action plans for improvement.

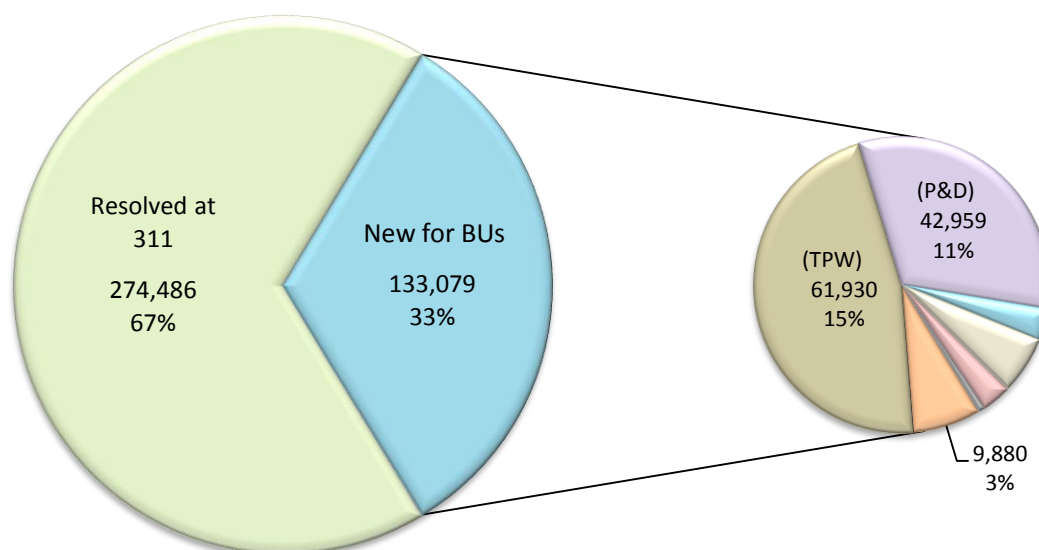
The accuracy of the Citizen Service Request Performance Report is dependent on standardized use of the Hansen CRM System as relayed during the refresher training sessions provided during the CRM 2.014 project. To support this accuracy, the quality assurance audit processes will begin operation in the upcoming quarter.

2014/15 YEAR END SUMMARY

2014/15 YEAR END SUMMARY

In fiscal 2014/15, HRM received 407,565 calls for service through its 311 Call Centre. Of these, 67% (274,486 requests) were resolved on initial contact with the HRM citizen and the remaining 33% (133,079) were referred to tier 2 business units for further action.

**New Citizen Service Requests
311 (tier 1) / BU's (tier 2)
April 01, 2014 to March 31, 2015**



■ 311
 ■ to HT
 ■ to TPW
 ■ to P&D
 ■ to OS
 ■ to FICT
 ■ to HW
 ■ to P&R
 ■ to Legal

Business Unit	Requests Received by 311	Requests Resolved by 311	Referred to Tier 2 / Further Action
HRM Total	407,565	274,486	133,079
HALIFAX TRANSIT	119,723	109,843	9,880
TRANSPORTATION & PUBLIC WORKS*	102,339	40,409	61,930
PLANNING & DEVELOPMENT	76,723	33,764	42,959
OPERATIONS SUPPORT	57,767	53,119	4,648
FINANCE & ICT	44,891	36,519	8,372
HALIFAX REGIONAL WATER COMMISSION	4,281	0	4,281
PARKS & RECREATION*	865	832	33
LEGAL, INSURANCE AND RISK	976	0	976

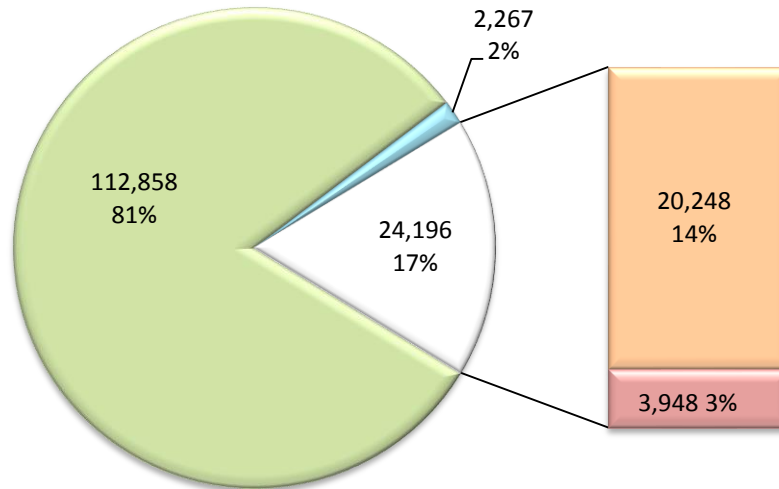
* Corrected to reallocate open parks requests back to TPW (pre-April 1st ownership) Breakdown of All New Requests Received

Business Unit Performance

Tier 2 business units carried forward 6,251 service requests from 2013/14 and received 133,079 new requests from HRM citizens, resulting in a total of 139,330 requests available to be resolved. At year end, business units had:

- Closed 112,858 service requests within the service standard
- Closed 20,248 service requests outside the service standard
- Left 3,948 service requests outstanding and overdue

HRM Tier 2 Citizen Service Requests April 01, 2014 to March 31, 2015

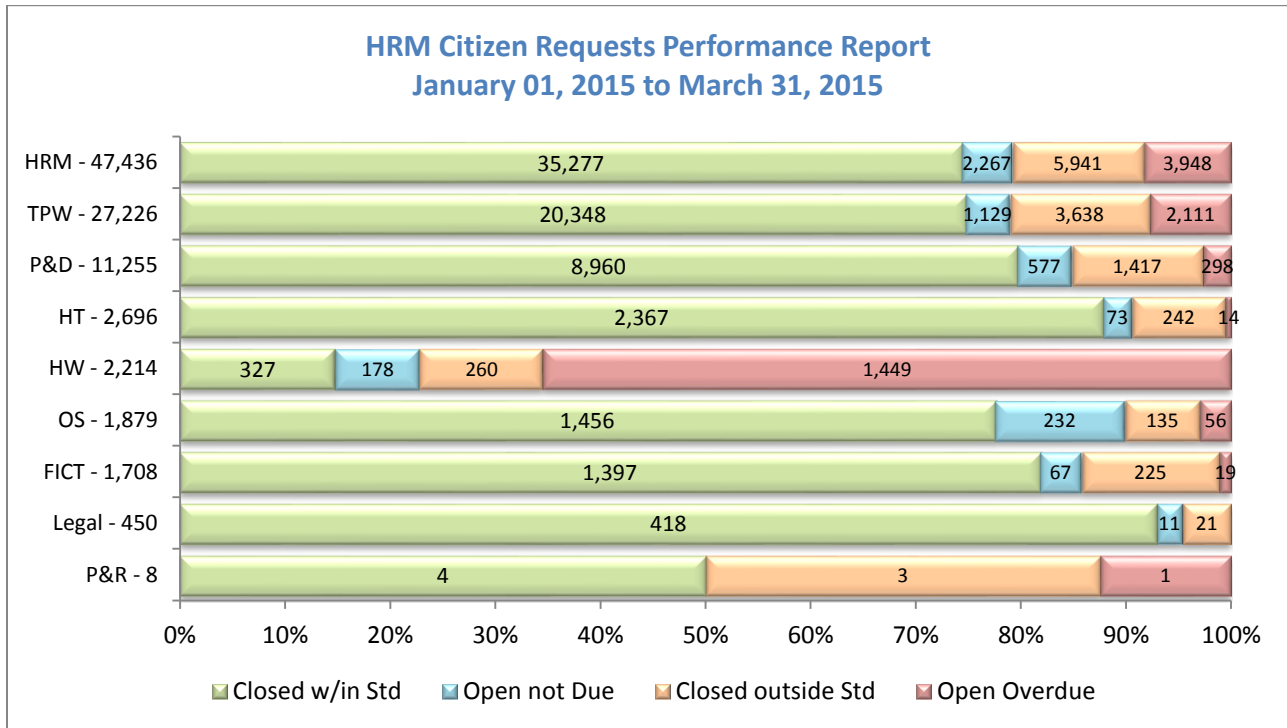


■ Closed w/in Std ■ Open not Due ■ Closed outside Std ■ Open Overdue

Tier 2 Service Requests Available to be Resolved by Resolution Status

2014/15 Q4 RESULTS

BUSINESS UNIT 2014/15 Q4 SUMMARY



Tier 2 Service Requests Available to be Resolved by Resolution Status

Results Summary

The goal when addressing citizen requests is to do so within established service standards. In 2014/15 Q4, HRM business units had 47,436 service requests available to be resolved. Of these, 74% were resolved within standard and another 5% are not yet due.

The remaining 21% were either closed outside of the service standard or were overdue at the end of the period. This is the opportunity for improvement (OFI). Twenty-one percent represents positive downward movement from the 2014/15 Q3 OFI which was 28%. It is possible that this change relates to a shift in the types of requests received this period and may or may not represent a sustainable improvement.

This quarter's overall tier 2 request volume was up almost 15,000 requests over last quarter. This is attributed to the extreme winter weather that resulted in over 22,000 snow and ice related requests.

Action Plan Summary

To address shortcomings in addressing citizen service requests in a timely manner and to ensure that recent improvements are sustained, business units have committed to:

- Increased supervisor accountability;
- Assessment and improvement of monitoring and resolution practices; and
- Continued monitoring and quality checks for newly implemented practices.

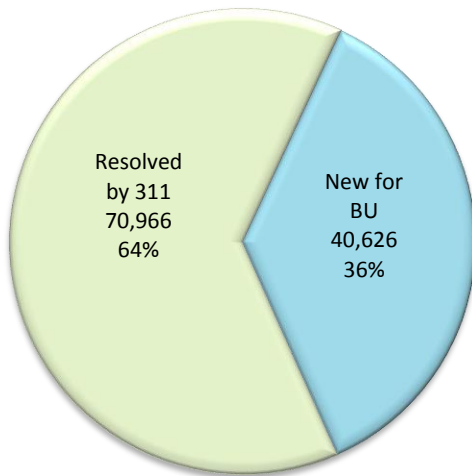
Specific business unit results, analysis, and action plans follow.

311 CALL CENTRE

2014/15 Q4 Results

The 311 Call Centre serves as the initial intake point for citizen service requests providing responses to general inquiries as well as intake and referral for requests that require business unit level expertise. This quarter, the 311 Call Centre resolved 64% (70,966 requests) of all calls received on initial contact with the HRM citizen. The remaining 36% (40,626) were referred to tier 2 business units for further action.

**New Citizen Service Requests
Tier 1 (311) / Tier 2 (BUs)
January 01, 2015 to March 31,
2015**



Business Unit	Requests Received by 311 (Q4)	Requests Resolved by 311 (Q4)	% Resolved by 311 (Q4)	% Resolved by 311 (Q3)
HRM Total	111,592	70,966	64%	71%
TRANSPORTATION & PUBLIC WORKS	38,756	15,323	40%	41%
HALIFAX TRANSIT	29,477	26,949	91%	92%
PLANNING & DEVELOPMENT	18,551	8,370	45%	51%
OPERATIONS SUPPORT	15,357	13,541	88%	95%
FINANCE & ICT	8,466	6,772	80%	81%
HALIFAX REGIONAL WATER COMMISSION	530	0	0%	0%
LEGAL, INSURANCE AND RISK MANAGEMENT	439	0	0%	0%
PARKS & RECREATION	16	11	69%	97%

FINANCE & ICT

2014/15 Q4 Results

Business Unit	Start	Service Request Activity During Period						End of Period		
	Tier 2	Tier 1	Tier 2				Tier 2			
	Open Volume	New Resolved by 311	New Service Requests	Total Requests Available	Closed Service Requests	Closed Within Standard	% Closed Within Standard	Open Volume	Open & Overdue	% Overdue
FINANCE & ICT	14	6,772	1,694	1,708	1,622	1,397	81.8%	86	19	1.1%
FINANCIAL POLICY AND PLANNING	0	0	1	1	1	1	100.0%	0	0	0.0%
ICT	0	0	43	43	42	42	97.7%	1	0	0.0%
REVENUE	14	6,772	1,650	1,664	1,579	1,354	81.4%	85	19	1.1%

The majority of new tier 2 citizen service requests received by Finance & ICT (FICT) in Q4 were related to taxation at 64%, pre-authorized payments at 13%, and collections at 12%.

This period, FICT had a total of 1,708 citizen service requests available to be resolved. Fourteen of these came forward from Q3 and the remainder were new requests. Of requests available, FICT resolved 1,397 (81.8%) within the documented service standard. Nineteen requests were open and overdue at the end of the period.

The percentage of requests resolved within standard is down from the Q3 performance of 90.7%.

Analysis

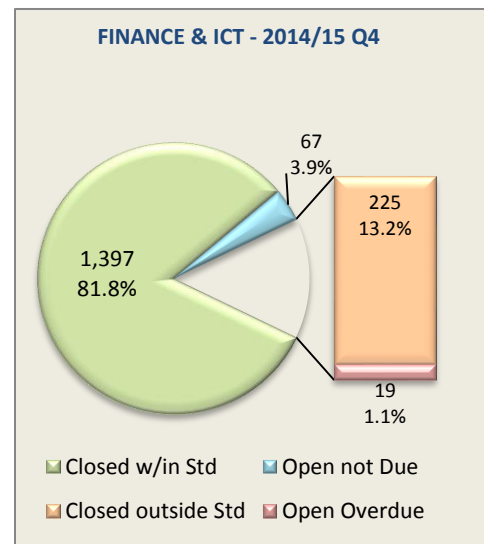
The decrease in performance in Q4 was related to the Revenue area and due to three main factors:

- From January to March 2015, the Revenue division was consistently down 3-4 FTE's (16%-21% of tier 2 staff complement).
- Increased call volumes due to changes to the Preauthorized Payment Program (PAP). Ten thousand letters were issued to PAP customers advising of changes to the program as well as changes to their monthly/bi-weekly payments.
- Increase call volumes due to the issuance of 90,000 tax bills in March

Action Plan

For the 2015-16 PDP plans, frontline Supervisors in Taxation, General Revenue, Cash Management and Collections have been assigned a 90% monthly service level target. Supervisors are also expected to address overdue service requests on a daily basis.

As of May 5th, the vacancies mentioned above still exist, but the positions have been approved for posting and Revenue should be fully staffed by the end of May. Services levels should improve by June and be consistent afterward.



HALIFAX TRANSIT

2014/15 Q4 Results

Business Unit	Start	Service Request Activity During Period						End of Period		
	Tier 2	Tier 1	Tier 2					Tier 2		
	Open Volume	New Resolved by 311	New Service Requests	Total Requests Available	Closed Service Requests	Closed Within Standard	% Closed Within Standard	Open Volume	Open & Overdue	% Overdue
HALIFAX TRANSIT	168	26,949	2,528	2,696	2,609	2,367	87.8%	87	14	0.5%
DIRECTOR'S OFFICE	105	26,949	2,257	2,362	2,292	2,121	89.8%	70	7	0.3%
PLANNING & SCHEDULING	63	0	271	334	317	246	73.7%	17	7	2.1%

The majority of new tier 2 citizen service requests received by Halifax Transit in Q4 were related to service and operator complaints (at 83%).

Halifax Transit carried forward 168 citizen service requests from Q3 and received 2,528 new requests to be resolved by the business unit (tier 2) for a total of 2,696 requests available to be resolved in Q4.

Of these requests, Halifax Transit closed 2,367 (87.8%) within standard which is a slight improvement over Q3.

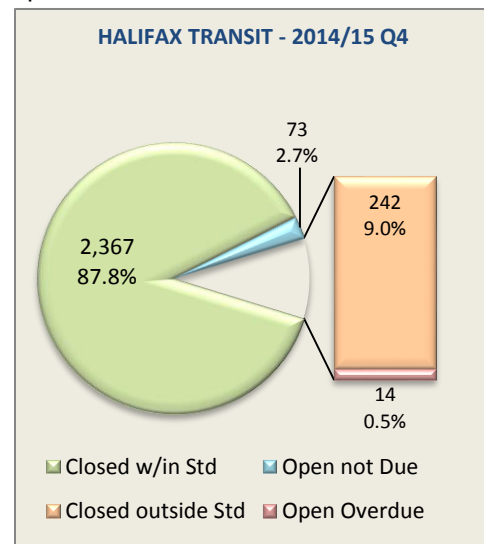
Transit has also made progress in addressing open and overdue requests showing a decrease from 81 in Q3 to 14 requests in Q4.

Analysis

In Q4, Halifax Transit worked with Transportation and Public Works to determine the best method of addressing service calls for which they had shared responsibility. This resulted in Transit taking on full responsibility for requests relating to maintenance of transit infrastructure such as stops, shelters, and benches. These requests represent 28% (68 requests) of Transit requests that were closed outside standard this quarter and 50% (7 requests) of those that are open and overdue. Transit is currently working on processes that will allow these requests to be resolved in a timely manner.

Action Plan

Halifax Transit will continue process work that supports timely completion of transit infrastructure requests.



LEGAL, INSURANCE AND RISK MANAGEMENT

2014/15 Q4 Results

Business Unit	Start	Service Request Activity During Period						End of Period		
	Tier 2	Tier 1	Tier 2					Tier 2		
	Open Volume	New Resolved by 311	New Service Requests	Total Requests Available	Closed Service Requests	Closed Within Standard	% Closed Within Standard	Open Volume	Open & Overdue	% Overdue
LEGAL, INSURANCE AND RISK MANAGEMENT	11	0	439	450	439	418	92.9%	11	0	0.0%
LEGAL, INSURANCE AND RISK MANAGEMENT	11	0	439	450	439	418	92.9%	11	0	0.0%

All of the new citizen service requests for Legal, Insurance and Risk Management are from citizens who wish to start claims against HRM.

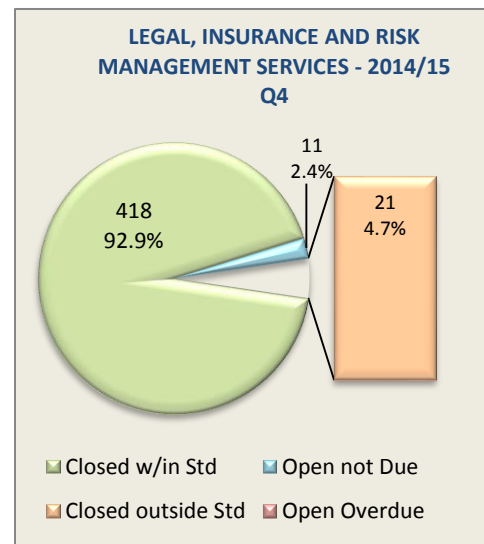
In Q4, Legal, Insurance, and Risk Management more than tripled its service request volume over Q3 with 450 citizen service requests available to be resolved. Despite this increase, the business unit maintained its performance level closing 92.9% of available requests within the service standard.

Analysis

Legal, Insurance, and Risk Management implemented the process and Hansen CRM System use improvements noted in the Q3 report and is now correctly showing that they have no open and overdue requests.

Action Plan

Performance is at an acceptable level. Risk Management will continue to monitor practices to maintain performance.



OPERATIONS SUPPORT

2014/15 Q4 Results

Business Unit	Start	Service Request Activity During Period						End of Period		
	Tier 2	Tier 1	Tier 2				Tier 2			
	Open Volume	New Resolved by 311	New Service Requests	Total Requests Available	Closed Service Requests	Closed Within Standard	% Closed Within Standard	Open Volume	Open & Overdue	% Overdue
OPERATIONS SUPPORT	63	13,541	1,816	1,879	1,591	1,456	77.5%	288	56	3.0%
CITIZEN CONTACT CENTRES	3	13,541	1,201	1,204	1,015	950	78.9%	189	5	0.4%
MUNICIPAL FACILITIES MAINTENANCE & OPERATIONS	60	0	615	675	576	506	75.0%	99	51	7.6%

The majority of new tier 2 citizen requests received by Operations Support in Q4 were related to animal licensing and tag renewal at 52% of requests. Operations Support also accepts maintenance requests for HRM buildings from the public representing approximately 8% of requests.

Operations Support carried forward 63 requests from Q3 and received 1,816 new requests in Q4 for a total of 1,879 citizen service requests available to be resolved within the business unit.

Of these requests, 1,456 (77.5%) were resolved on or before the due date representing an improvement over Q3 which came in at 71.6%.

Analysis

Within Facilities Maintenance & Operations, an effort continues to reconcile older service requests that may not have been closed in the Hansen CRM system when the work was completed. This accounts for approximately 37% of the service area's closed outside standard requests.

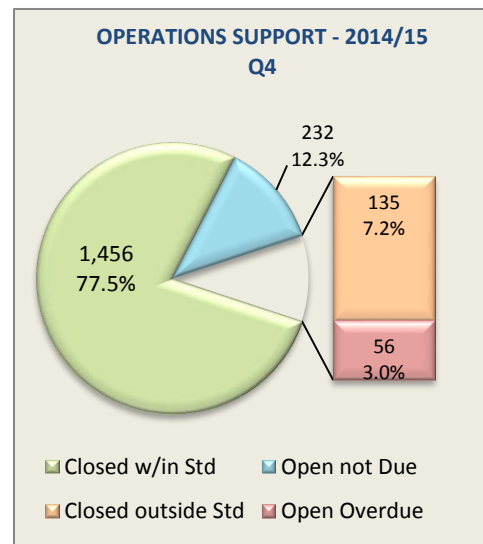
The Citizen Contact Centres had a total of 65 service requests that were closed outside standard. This is attributed to two types of citizen requests:

- Printed Material Mail Outs – impacted by the need to focus staff efforts on snow and ice related calls and a delay in receiving printed material from business units
- Dog Licencing Payments – caused by high volume associated with the March 31st dog licensing due date and changes to credit card handling procedures to address Payment Card Industry (PCI) compliance issues.

Operations Support had 56 requests outstanding and overdue at the end of Q4 which is up from 37 in Q3. Of these, 51 belong to Facilities Management. Because the service area tracks its work orders in SAP which is separate from the Hansen CRM system, there can be delays in indicating that service requests are complete.

Action Plan

Facilities Maintenance & Operations will continue reviewing service requests and monitoring adjusted processes to ensure timely updating of the Hansen CRM system. This will allow a more accurate portrayal of the state of its service requests.



PARKS & RECREATION

2014/15 Q4 Results

Business Unit	Service Request Activity During Period							End of Period		
	Tier 2	Tier 1	Tier 2					Tier 2		
	Open Volume	New Resolved by 311	New Service Requests	Total Requests Available	Closed Service Requests	Closed Within Standard	% Closed Within Standard	Open Volume	Open & Overdue	% Overdue
PARKS & RECREATION	3	11	5	8	7	4	50.0%	1	1	12.5%
PROGRAM SUPPORT SERVICES	3	11	5	8	7	4	50.0%	1	1	12.5%

All new tier 2 citizen service requests received for Parks & Recreation in Q4 were related to civic events and event grants.

This quarter, Parks & Recreation had a total of eight requests available to be resolved. Of these, three were carried forward from Q3 and five new tier 2 requests were received. Four of eight (50%) available tier 2 requests were closed within the service standard. One request remains open and overdue.

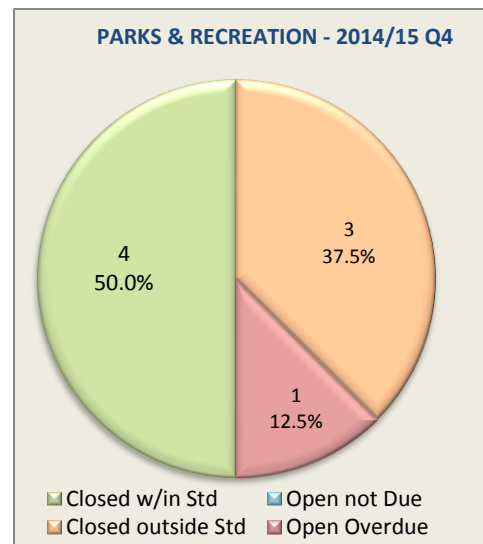
Analysis

Of the three service requests that were resolved outside standard; one had been misdirected, one came in during New Year's Eve events when staff were focused on event logistics, and the third was not picked up by triage processes.

Program Support Services is now conducting monthly reviews of all requests to ensure that the majority are addressed within the service standard and that those requiring additional work are able to be assigned properly. In addition, updated request descriptions have improved the ability to assign requests to the correct staff.

Action Plan

As of April 1, 2015, Parks & Recreation will take over responsibility for service requests associated with parks and open space management. To support success in this new role, Parks & Recreation will be undertaking a review into the nature, volume, and processes related to these requests to determine any process improvements or training that is required.



PLANNING & DEVELOPMENT

2014/15 Q4 Results

Business Unit	Service Request Activity During Period							End of Period		
	Tier 2	Tier 1	Tier 2					Tier 2		
	Open Volume	New Resolved by 311	New Service Requests	Total Requests Available	Closed Service Requests	Closed Within Standard	% Closed Within Standard	Open Volume	Open & Overdue	% Overdue
PLANNING & DEVELOPMENT	1,074	8,370	10,181	11,255	10,377	8,960	79.6%	875	298	2.6%
DEVELOPMENT APPROVALS	316	0	1,624	1,940	1,796	1,468	75.7%	141	82	4.2%
MUNICIPAL COMPLIANCE	758	8,370	8,557	9,315	8,581	7,492	80.4%	734	216	2.3%

The majority of new tier 2 citizen requests received in Q4 for Planning & Development (P&D) relate to parking enforcement at 48%, development approvals at 16%, and animal control at 13%.

This quarter, Planning & Development had 11,255 tier 2 citizen service requests available to be resolved. Of these requests, the business unit closed 8,960 (79.6%) within the documented service standard.

P&D has continued to review outstanding and overdue requests from previous reporting periods reducing the number outstanding and overdue by 150 service requests in Q4.

Analysis

The majority of overdue requests remaining are within the Municipal Compliance service area with highest numbers related to minimum standards at 24%, permit inquiries / complaints at 20%, and unsightly property complaints at 13%.

This quarter saw an increase in service requests closed outside standard. This can be attributed to two factors:

- assessment and closure of older requests from prior periods – appx 22% of late requests
- high volume of illegally parked / abandoned vehicle requests due to extreme winter conditions – 39% of late requests

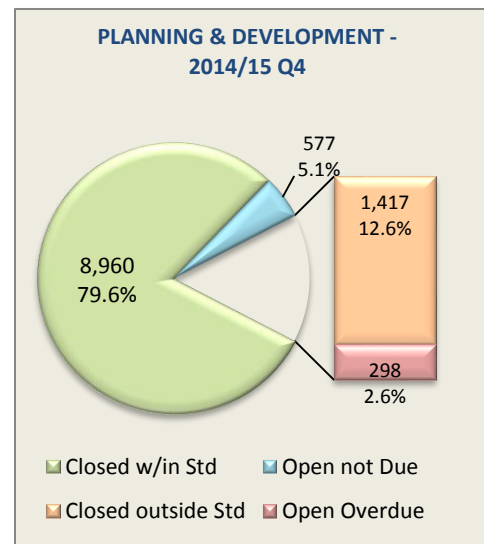
P&D continues to address the factors that contribute to open and overdue requests as described in the Q3 report:

- incorrect assignment;
- assignment to absent staff; or
- assignment to staff without follow up audit of compliance inside the response standard.

Action Plan

Planning & Development will:

- continue with newly implemented business protocols that oversee daily quality assurance checks and service request assignment
- assess possible Hansen CRM use issues and provide staff refresher training as needed
- ensure that methods used for picking up service requests do not allow requests to be missed regardless of incorrect assignment



TRANSPORTATION & PUBLIC WORKS

2014/15 Q4 Results

Business Unit	Service Request Activity During Period							End of Period		
	Tier 2	Tier 1	Tier 2				Tier 2			
	Open Volume	New Resolved by 311	New Service Requests	Total Requests Available	Closed Service Requests	Closed Within Standard	% Closed Within Standard	Open Volume	Open & Overdue	% Overdue
TRANSPORTATION & PUBLIC WORKS	3,793	15,323	23,433	27,226	23,986	20,348	74.7%	3,240	2,111	7.8%
PROJECT PLANNING & DESIGN	31	2	24	55	47	21	38.2%	8	4	7.3%
ROAD OPERATIONS & CONSTRUCTION	973	7,347	17,125	18,098	16,211	15,510	85.7%	1,887	1,091	6.0%
SOLID WASTE RESOURCES	172	7,974	3,428	3,600	3,439	3,312	92.0%	161	67	1.9%
TRAFFIC MANAGEMENT	2,617	0	2,856	5,473	4,289	1,505	27.5%	1,184	949	17.3%

This quarter, inquiries and complaints related to snow clearing (at 65%), solid waste collection (at 15%), street lights and signals (at 9%) made up the majority of new tier 2 Transportation and Public Works (TPW) citizen service requests.

TPW carried forward 3,793 requests from Q3 and received 23,433 new requests in Q4 for a total of 27,226 citizen service requests available to be resolved within the business unit. Of these requests, 20,348 (74.7%) were closed within the documented service standard, up from 55.3% in Q3, and 2,111 requests were outstanding and overdue at the end of the period.

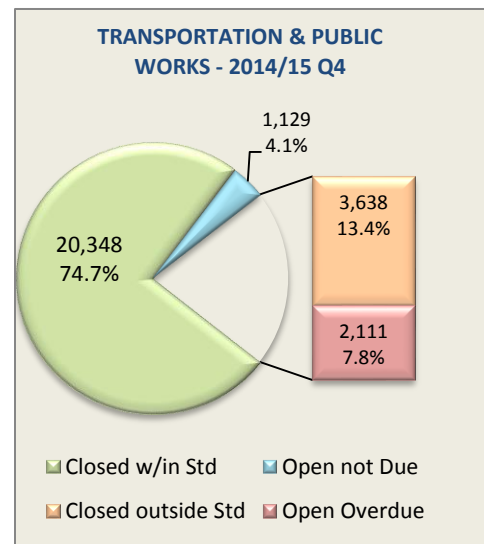
Analysis

Road Operations and Construction

With contracted and HRM staffed crews not able to keep up with an extreme winter, Road Operations and Construction experienced a 248% increase in winter works calls over the same quarter last year. These calls accounted for 92% of all Road Operations and Construction calls for the quarter.

Despite this high volume, a change in the method used to address calls resulted in a much higher percent of winter works requests resolved within standard (98%). Certain types of winter works calls (such as those for road widening after the heavy ice and snow build up) were catalogued for later review / work and the service requests were updated to “resolved” status within the Hansen CRM system. A new process was also put in place to speed up the processing of snow damage allowing resolution of these call types at a higher level.

Over the past two quarters, Road Operations and Construction (ROC) has implemented a full review of service requests within the Hansen CRM system. This included reviewing overdue calls with supervisory staff and ensuring follow up. The additional focus has resulted in greater accountability with supervisors being more responsive to their calls and resolving many older or overdue requests. Updated process includes sending reminders to the group which has triggered a higher level of attention and resolution. Road Operations and Construction has identified dozens of service requests under its responsibility that have been assigned to other departments or non-ROC staff. These are being addressed for the next



quarter and a thorough review of open service requests is underway.

Solid Waste Management

At the end of Q4, Solid Waste Management was reporting 67 overdue service requests compared to 32 at the end of Q3. This increase was due to a delay between the work orders being completed by the service provider and the data entry into the Hansen CRM system. These records are now updated.

Traffic Management

This period, Traffic Management has concentrated on understanding and resolving its open and overdue service requests. This focus has resulted in a reduction from 2,339 overdue requests in Q3 to 949 at the end of Q4. In addition, Traffic Management has been able to identify some system issues which are being investigated by Information, Communication, and Technology.

Action Plan

Steps will be taken to identify gaps in service capacity in order to understand and improve the ability of divisions to meet service request standards in the aforementioned areas. Doing so will improve the overall performance of the business unit.

Modifications to an existing Road Operations and Construction report are underway to provide Traffic Management with a tool to identify service requests that are overdue by type and assigned supervisor. This will support closer review and updating of service requests.

A meeting with 311 staff was completed to discuss an improper service request linking process being used by some staff. This appears to be generating a number of unresolved/overdue requests. The correct process will be reviewed with the supervisors of staff who are not completing the appropriate steps when linking service requests.