

SBStat | Customer Service

2022 Quarter 1 | March 28, 2022 City of South Bend

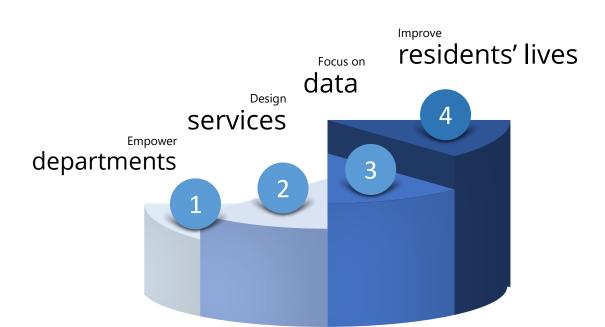


Why we're here
Citywide Performance
Management

Our Goals:

- 1. Make the basics easy
- 2. Deliver good government
- 3. Invest in people and places

Our Process:

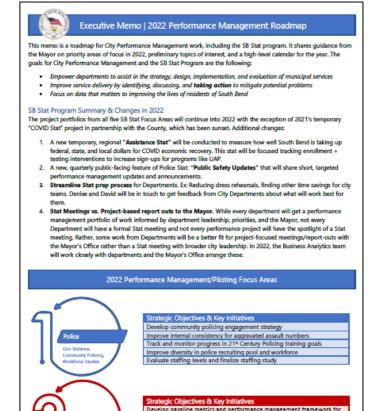


This SB Stat Meeting

	In the administration	In the community
Excellence	For each major area of service delivery, establish South Bend as the best in the state, and/or in the top 25% nationally, measuring and reporting progress.	Establish a path for major indicators of resident well-being to reach the status of best-in-state or top-25% nationally, including the means to measure progress.
Accountability	Put residents first always, offering services at the greatest value to the taxpayer, with clear and transparent indications of how the government is using public resources.	Promote a culture of civic engagement in which we hold one another to a high standard of respect, stewardship, and support for our shared community.
Innovation	Deliver better services more efficiently by introducing creative approaches to government operations, questioning habit and using evidence to continually improve.	Foster a culture of innovation in South Bend's social and private sectors, seeking and developing the best ideas and practices from within and beyond our city limits.
Inclusion	Ensure the city administration, as an employer and as a purchaser, reflects the community it serves and includes diverse voices in our decision-making and actions.	Develop a community in which everyone has an equal opportunity to thrive by expanding access and participation to all, incorporating diverse voices throughout the city.
EMPOWERMENT	Establish a work environment that enables employees to contribute richly to the administration and the community, taking pride and ownership in our work.	Support the ability of all residents to live a safe, healthy, meaningful life in South Bend, contributing as they are able and benefiting from all that our community offers.

Streamlined SB Stat

A few process changes to note for 2022



collective opioid response (shared with Fire)

Evaluate fire station infrastructure needs to improve firefighter health

Reducing dress rehearsals, pre-Stat formal meetings

Save time for departments

Reduce general departmental project updates

 Allow Stat to focus cross-Departmental evaluation, innovation, analysis, and problem solving conversations across City Leadership

Customer Service Portfolio Summary

SBStat projects in the queue for 2022

Project	Brief Description
Leverage delinquency and code data to find best eviction prevention intervention window	Predictive analysis project informing a 311/EEE pilot
More generous, efficient "shut-off" process	New shut-off process map; preliminary analysis of process
Improve Solid waste missed pick-up and EPU policies	Cost-benefit analysis + new policy recs
Improve pothole response time	SLA analysis; Design and conduct pilot with streets; deliver pilot results
Improve customer interactions with frontline Utility Staff	Analysis of post-call surveys; proposed scripts/processes for identified pain points
Plan for the "One Stop Shop" for Customer Service at new City Hall	Best practices from similar set-ups in other cities and the private sector; Proposed Plan for new South Bend City Hall

Today's Agenda

I. Data overview from previous Stat meeting

II. Deep-dive analysis & discussion

- Resident feedback on why they pay utility bills in person
- Water shut off process improvement project
- 311 Peer Analysis, Resident Engagement Feedback

III. Celebrating our values

Data overview from previous Stat meeting

Summarizing data points and statistics from the past quarter related to core operations

311 KPIs | Year in Review



Deep-dive analysis & discussion

Diving deep into a few key initiatives being undertaken to improve city performance

- Utility customer engagement projectWater Shut-off Process Redesign
- 311 Usage Analysis + Recommendations

Ahead of operational changes, we engaged with residents who still pay their city utility bill in person.

Innovation | In the Administration

"...questioning habit and using evidence to continually improve."





Background



Survey set up



Questions



Responses



Considerations for moving the utilities office

Background

Some residents prefer paying their utility bill at the utilities office. After discussing different payment options at Q4 stat, we wanted to understand:

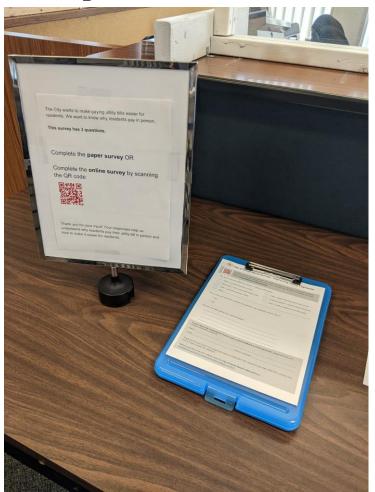
- Why residents prefer to pay in person vs. other options
- If they pay other non-City bills in person

We started a survey at the office on March 2.

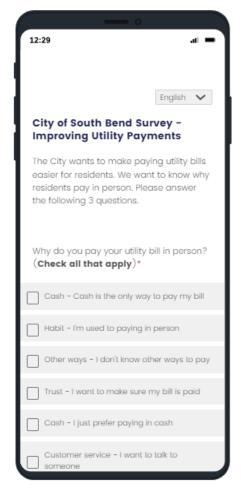
Drive thru (16 responses)



In office (1 response)



Online (0 responses)



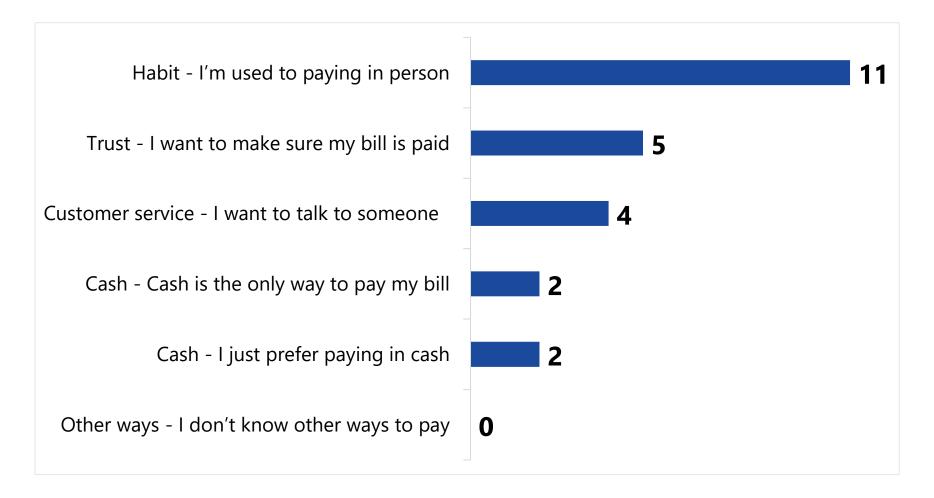
Questions - English

∪ н:	abit - I'm used to paying in person		Cash - Cash is the only way to pay my bill
U 0	ther ways - I don't know other ways to pay		Customer service - I want to talk to someone
c	ash - I just prefer paying in cash		Trust - I want to make sure my bill is paid
_ o	ther		
Do you p	ay your other bills in person (for example: r	rent, electri	city, phone, etc.}?≛
Do you pa		rent, electri	city, phone, etc. <u>}?*</u>
	es	rent, electri	city, phone, etc.} 2 *
O Ye	es	rent, electri	city, phone, etc. 🔑
O Ye	es o	rent, electri	city, phone, etc.}2*

Questions - Español

Hábito - Estoy acostumbrado a pagar en persona Otras formas - No conozco otras formas de pago	En efectivo - El efectivo es la única forma de pagar mi factura Atención al cliente - Quiero hablar con alguien Confianza - Quiero asegurarme de que mi
Defectivo - Prefiero pagar en efectivo Otro Paga sus otras facturas en persona (por ejemplo:	

Q1 - Why do you pay your utility bill in person?* (Check all that apply)



Q2 - Do you pay your other bills in person (for example: rent, electricity, phone, etc.)?*

Response	%	Count
Yes	65%	11
No	24%	4
(Blank)	12%	2

Q3 - How can we make paying your utility bill easier?

Online payments	trying to do more online, no time
Customer service	Gas and electric and telephone there is no more in person bill pay(?). I have to mail those. Paying in person is a way to speak with customer service. It is a pleasure to the bill to speak with a person and not a machine
In person payment/habit	I like paying my bills in person Just used to paying like this It is good now in my opinion! So far everything is great coming to pay my Bills in Person.
Drive thru	Keep drive through open please
Due dates	Stop changing due dates

SBStat 2022

Considerations for **Managing Change** for **customers** (i.e. closing office, Kiosks, drug store partnerships, etc.)

- No feedback indicated an attachment to paying downtown specifically
 - More about method ("I like talking to people" or "I like the drivethru") than location
- Potential pushback against getting rid of the drive thru
 - Most survey responses came from the drive thru
- Paying in person seems to be more about habit/preference than ability
 - The top 3 reasons why people paid in person are Habit, Trust, and Customer Service

Tips for Initiating Behavior Change for Customers

It's easier to transition to a similar behavior vs. changing altogether. How do we replace people's habit of going to the utilities office with a similar one that emphasizes **Trust and Customer Service?**

- "I like talking to a person." >>> Transition to 311, Future City Hall One Stop Shop Option
- "I like paying in-person" >>> Transition to drug store partnership locations
- "I like the drive thru" >>> Look into making at least one Kiosk driveup
- "I'm used to doing this." >>> Make change easier through trainings, outreach, and giving notice of change for impacted customers

Developing a more lenient, communicative, and connective water shut off process

Innovation | In the Administration

"...questioning habit and using evidence to continually improve."





Project Timeline & Background



Legal Framework & Constraints



Process Overview



Resident Feedback



Opportunities & Next Steps

Project timeline

Week 1 – Mar 2	Scoped project
Week 2 – Mar 9	Kicked off project + reviewed process
Week 3 – Mar 15	Brainstormed ideas
Week 4 – Mar 23	Prioritized ideas
Week 5 – Mar 30	Draft ideas + model revenue/cost impacts
Week 6 – Apr 7	Finalize ideas
By end of April	Present ideas to Mayor's Office

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Project Background

We will resume water shut offs in June 2022. We haven't done water shut offs since early 2020 due to COVID-19.

The Utility Forgiveness Program helped South Bend residents with current large balances. Moving forward, residents will still need to figure out a way to pay their pay on the time.

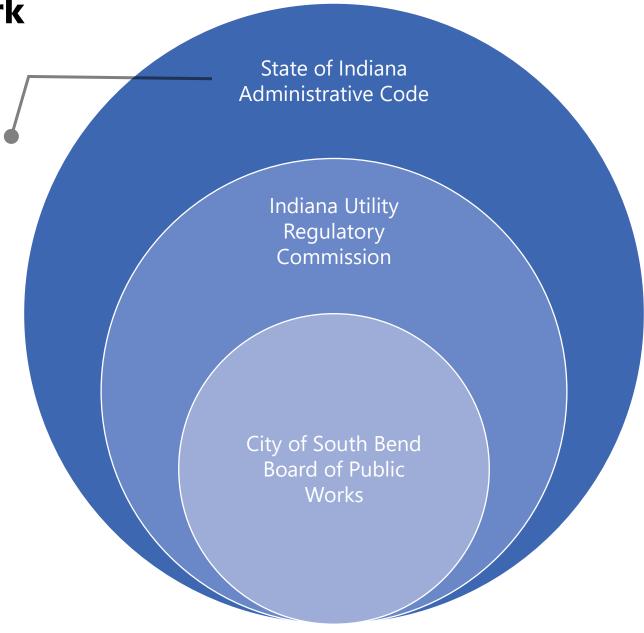
In our current state, residents who don't pay on time could accrue larger balances and not have running water. City utilities staff could go back and forth to turn water on and off, weakening valves and leading to breaks.

Legal Framework

State Administrative
Code uses **permissive language** on
disconnection
procedures, giving
considerable discretion
to local agencies

170 IAC 6-1-16 Disconnection of service;

"...a utility, upon providing the customer with proper notice as defined in subsection (e), **may** disconnect service subject to the other provisions of this rule."



State Agency Jurisdiction over Water and Wastewater Utilities

			IDEM			IURC						DNR		ISDH				
Type of Utility	NPDES Permitting ¹	Construction Permits	Operator Certification	Monthly Report of Operation	Oversee Entity Start-up	Rates and Charges	Rules and Regulations	Territory Authority (CTA)		•	The Commission (IURC) mainly regulates the economic aspects of a utility, ensuring that its rates are reasonable							
Investor-Owned Water		~	✓	✓		✓	✓		,		Rules and regulations typically							
Investor-Owned Wastewater	~	~	✓	✓		✓	✓	1	,		approved at the local level							
Not-for-Profit Water		✓	✓	✓		✓	✓		,									
Not-for-Profit Wastewater	~	✓	✓	✓		✓	✓	✓	,									
Water Authority		✓	✓	✓		✓	✓		v		√			√	√			
Municipal Water		√	√	√		√			V		✓ 3		✓	✓	V			
Municipal Wastewater	✓	✓	✓	~								✓					✓	

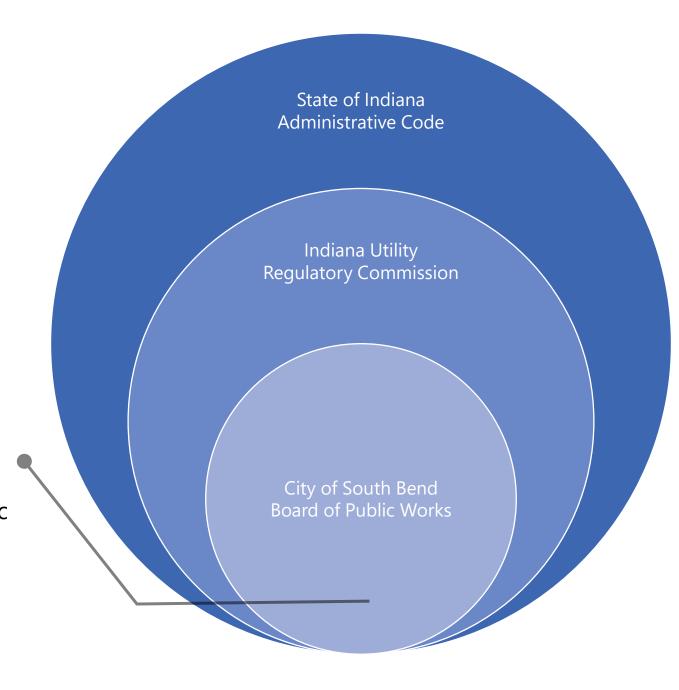
Source: 2021 Indiana Utility Regulatory Commission Annual Report

Background

- SBMU Rules and Regulations last revised in June 2019
- Language on disconnection procedures modeled largely off of State Administrative Code

Key Takeaway

 Therefore, significant process changes may need to be approved by the Board of Public Works



Constraints to fundamental process changes

- Though the City is not required to conduct shut offs, it is "the stick" the City uses to incentivize utility bill payment
 - Reducing the number of water shut offs may negatively impact the rate at which the City collects revenue from utility bills
- Enterprise fund limitations
 - Local governments are, in most instances, not allowed by statute to transfer monies between enterprise operation funds and their general fund except under special circumstances
- Restrictions on tax liens and water service charges

Opportunities

We have utility data that helps us identify payment patterns, who's most at-risk for water shut offs, where they could happen the most, etc.

We have legal flexibility to explore less stringent penalties for bill delinquency and their impact on revenue forecasts

We could prevent water shut offs by being:

- More lenient
- More communicative
- More connective



Sent - Day 1

June bill: \$50

Due date - Day 21



Day 25June bill - IVR #1





Sent – Day 1

June bill: \$50 + \$5

July bill: \$50

Due date - Day 21





Day 25July bill - IVR #1



Sent - Day 1

June bill: \$50 + \$5

July bill: \$50 + \$5

August bill: \$50 + \$33

You could get your water shut off if you don't pay

Due date - Day 21





Day 15July bill - IVR #2



Day 22 July bill - IVR #3



Day 25 August bill - IVR #1



August

Hearing from residents

Quotes are from the Utility Relief Inquiry Form (after Utility Relief announced March 2, 2022)

3/2/2022

I am in dire need with my water bill!!

I have been calling every place I can think of that helps with utilities but to no avail!!

I'm not sure if the utility relief is planning on helping me before leaving this message but I sure can use it like yesterday!!

I am a single Mother to 5 kids with no job pls help!!

Hearing from residents

Quotes are from the Utility Relief Inquiry Form (after Utility Relief announced March 2, 2022)

3/3/2022

Inquiring about my having (our) my water bill paid!

My husband Frank had Advanced Stage, Metastatic Prostate Cancer for 10 yrs. and he died 08/15/2021 in my arms at home.

His last couple of years were truly bad.

We got behind in all of our utility bills, but the water bill is the worst.

And now on Widow's Benefits, I'm having trouble just barely getting anything paid.

I would so appreciate having my water bill paid! Thank you in advance.

Hearing from residents

Quotes are from the Utility Relief Inquiry Form (after Utility Relief announced March 2, 2022)

3/3/2022

My water bill is at 1,640.13

and I have no way to get it pay up in time when I already have highly rent and other utility bills to pay.

I would really like some help.

Hearing from residents

Opportunities	Challenges	
More lenient	 I didn't have enough money when my bill was due I had other bills to pay 	
More communicative	 I didn't know how much to pay and when 	
More connective B Stat 2022	 I didn't know how I can get help to pay my bill I likely don't have information about other resources 	

Ideas More lenient

Flexible payment

Promise to Pay – delay shut off 15 days (existing)

Installment Agreement – catch up on bill over 3 months (existing)

0% interest loans through <u>Promise</u> or other groups

Criteria for shut off (income, seniors/families, etc.)

Software

Interactive work orders – payment immediately deletes water shut off (existing)

Documentation

Documentation for field processes

Ideas More communicative

Redesigning materials

A more distinguishable bill

Envelope has overdue message

Informational insert

Outreach

Press release

Rename process to "Connection process"

Before June, send notice to customers with large balances

Educate about Installment Agreement program

Calls

Limiting calls so resident doesn't get confused

State amounts in automated calls need to pay

Ideas More connective

Redesigning materials

Flexible payment + assistance programs on the bill

Flexible payment + assistance programs on the insert

Outreach

Contact UAP members to inform of LIHEAP

Targeted outreach for assistance programs based on utility relief data (existing)

Enroll in programs

Require UAP application before turn on water

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Discussion questions

- Is there other criteria the City should consider when residents face water shut off?
 - For example, "The City will not conduct water shut offs...
 - ...on days when the school system is closed"
 - …for homes with children"
 - ...for accounts enrolled in assistance programs and making a reasonable monthly payment"
- Are there other "sticks" the City can use to incentivize utility bill payment?

To improve equity of services and service delivery, benchmarking 311 use to peers + engaging with residents on 311 awareness.

Excellence | In the Administration

"... establish South Bend as the best in the state, and/or in the top 25% nationally."

Overview

- Background
- 311 usage across city + city comparison table
- Resident Engagement Process
- Resident Takeaways
- Proposed Actions

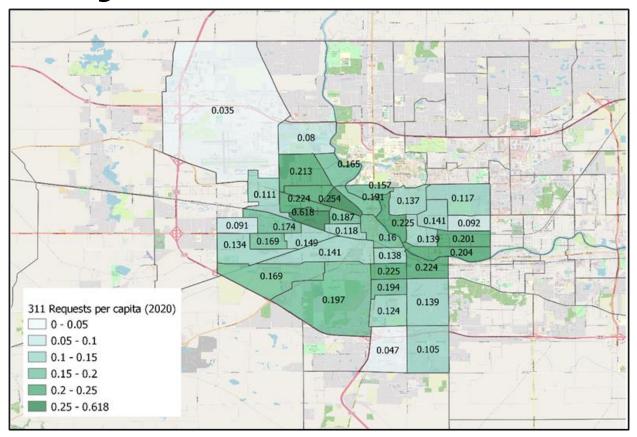
Background

Partnered with former Bloomberg Fellow, Juliahna Greene, to analyze 311 usage and provide recommendations to optimize usage locally.

Questions:

- Based on peer cities, how well utilized is 311 currently?
- Any equity/access concerns to address in future planning?
- General best practice recommendations based on other cities + resident feedback

311 per capita across South Bend by census tract



*Note: per capita analysis across city is helpful as an estimate of equitable usage, but not a perfect indicator

City Comparison: 311 per capita

City	Population	311 Requests per capita	Modes
Grand Rapids, MI	198,401	0.406	App, Call Center, Email, Website, In- Person
Hamilton, OH	62,182	0.058	App, Website
Hampton, VA	135,041	0.392	App, Call Center, Email, Website
Mankato, MN	42,093	0.107	App, Call Center, Email, Website
McAllen, TX	141,968	0.835	App, Call Center, Website
Miami Dade County, FL	2,717,000	0.184	App, Call Center, Email, Website
Revere, MA	53,692	0.130	App, Call Center, Email, Website
Somerville, MA	80,906	1.323	App, Call Center, Email, Website
South Bend, IN	101, 393	0.155	Call Center, Website, Email
St. Petersburg, FL	261,338	0.336	App, Call Center, Emall, Website

Resident Engagement Sessions



To illuminate usage data across the city, qualitative data was collected from customers via focus groups.

- 3 Focus Groups in December 2021
- Recruited via westside neighborhoods
- 36 residents
 - Each 5+ years living in South Bend
 - >50% Black
 - Ages range from 25-75
 - A third had never heard of 311

Compelling Quotes

"I don't check my mail for a week at a time, but I never miss the flyers that come home with my kids."

"On a whim, I called about a hanging wire. Who knew you could call 311 for something like that?"

"After this, I want to help spread the word about 311. I could even advertise the service in my salon."

Compelling Quotes II

"I always ask myself 'is this a fight worth fighting' before I call the city because they never help me with my requests and I know I'll have to call several more times to get anything done."

"Show me that 311 can get the job done and I'll start using the service."

"311 needs to act like its running for office. I want a 311 month where I see flyers for 311 everywhere I go, advertisements all over social media, and someone comes knocking on my door to tell me more."

Takeaways

- Customer themes:
 - Prove/show the value to me and I'll buy in
 - Bad experiences are chilling
 - We want to hear more in more places
 - We can help

Takeaways + 2022 Pilot Ideas

- Customer themes + Corresponding Pilots/Actions:
 - Prove/show the value to me and I'll buy in
 - Storytelling/campaigns on change, resolved issues
 - Bad experiences are chilling
 - Keep monitoring repeat call situations, new post-call surveys
 - We want to hear more in more places
 - New advertising: School flyers, Library partnerships (ex: 311 stations)
 - More: Social media, radio, Transpo
 - We can help
 - 311 Ambassador/Navigator Program

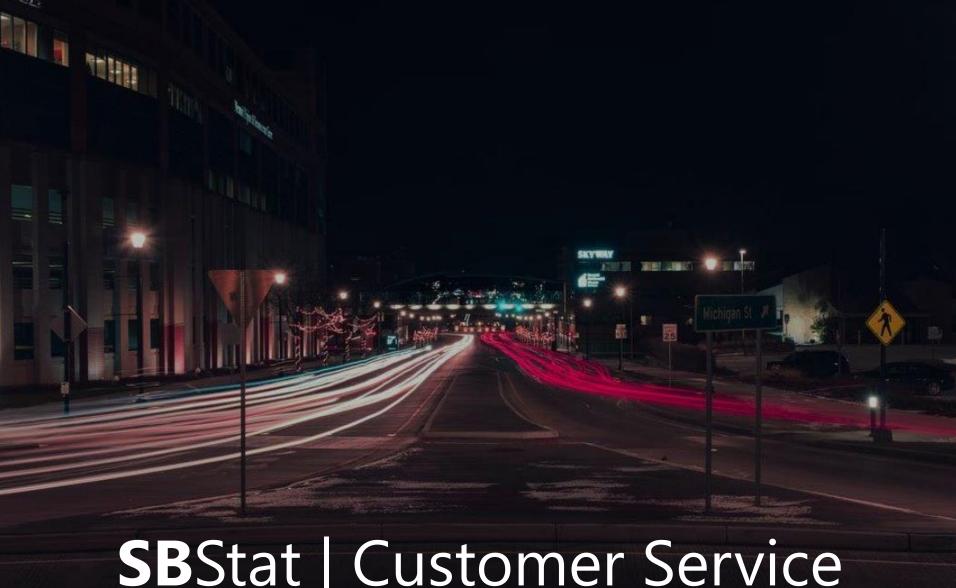
Celebrating our values

This section highlights exemplary work happening in the City to improve performance that may otherwise go unnoticed

Celebrating our Values

Utility Forgiveness





SBStat | Customer Service

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