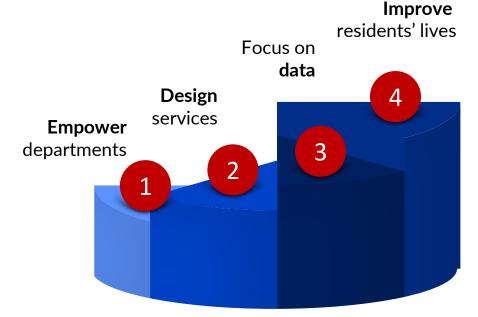


Citywide Performance Management

The purpose of SB Stat is to bring the most powerful people in the City – the Mayor, Department Heads, and key staff – into a room to **use data and take action** on some of the City's most pressing challenges



#### Stat meeting structure & cadence

Why we're here

- The Mayor's Office sets the agenda for the meeting
- The Business Analytics team schedules the meeting each quarter and invites attendees
- The Business Analytics team documents all action items discussed during the meeting and assigns each item to the appropriate City team

Participants	Purpose in the Stat meeting	
Project Leads, analysts, and other key staff	<ul> <li>Lead discussion on assigned projects</li> <li>Contribute with ideas, knowledge on data sources, and suggestions for improving performance</li> </ul>	
Mayor & Department Heads	<ul> <li>Share ideas, ask questions and contribute to discussion on strategy and performance targets,</li> <li>Assign next steps to relevant members of their department/teams</li> </ul>	

### Customer Service Portfolio Summary

Project	Project Objectives	Status
Post call surveys	Improve frontline customer service interactions	
SR dashboard Implementation	Improve access to service request performance data and facilitate process improvement	
Utility data report	Review utility data in monthly report	
City hall One Stop Shop	Plan for One Stop Shop for Customer Service at new City Hall	
Solid Waste – 311 Coordination	Reduce the average number of days to complete Solid Waste service requests made via 311	0

Legend Project on schedule Project delayed Project cancelled

### Today's Agenda

- I. Data summary + action plan on quarterly KPIs
- II. Deep-dive on select projects and challenges
- 311 Service Portal request analysis
- Streets SLA performance analysis
- III. Changes to 2024 SB Stat
- IV. Celebrating our values

### Customer Service KPI Summary

Customer Service KPIs	Type of performance measure	How we measure success	Desired outcome	How the metric aligns with the City's values
Customer Satisfaction	Effectiveness	Post call survey average ratings at least 4.5 for all categories	Residents receive excellent customer service over the phone	Excellence
Timeliness (Resolution)	Effectiveness	"Yes" responses to Q5 Resolution is at least 80%	Residents resolve their issue OR Residents get questions answered in one phone call	Innovation
Timeliness (Communication)	Efficiency	"Yes" responses to Q6 First- time call Yes is at least 80%	Residents don't have to call multiple times for the same issue	Accountability
Equity & Access	Effectiveness	Percent of service     requests complete on time by     census tract and income	Residents receive the same quality and number of services regardless of location or other demographics	Inclusion
Responsiveness	Efficiency	More than 80% of calls received are answered within 30 seconds	City employees are responsive to resident needs	Excellence

### **Customer Service KPIs**

### Q3 + October 2023

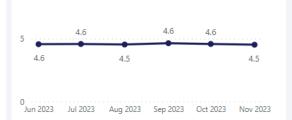
Performance Objective	KPI	Q2 2023	Q3 + Oct 2023	Percent Change
Customer Satisfaction	Average - All post call survey questions	4.6	4.6	<del>-</del> 0%
Timeliness (Resolution)	Percent answered "Yes" to Q5 Resolution	86%	86%	<del>-</del> 0%
Timeliness (Communication)	Average – Percent answered "Yes" to Q6 First-time Call	72%	72%	<b>-</b> 0%
Responsiveness	Percent of Calls that are answered within 30 seconds	76%	70%	<b>↓</b> 6%

### CoSB Post Call Survey Results | Summary

#### Averages over last 6 months

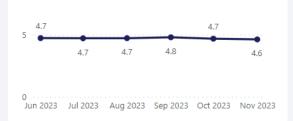
#### **Q1 Customer Satisfaction**

How would you rate your satisfaction with your 311 call today?

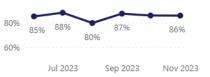


#### Q2 Friendliness

How would you rate your satisfaction with the friendliness of the agent who handled your call?

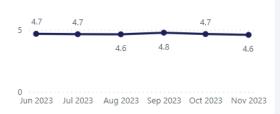


Was your request resolved today? (Yes%)



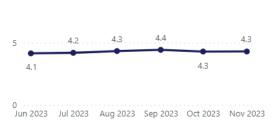
#### Q3 Knowledge

How would you rate your satisfaction with the knowledge of the agent who handled your call?



#### **Q4 Timeliness**

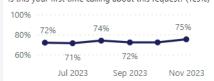
How would you rate your satisfaction with your call's wait time?



#### Q6 First-time call

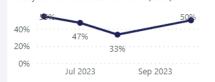
Q5 Resolution

Is this your first time calling about this request? (Yes%)



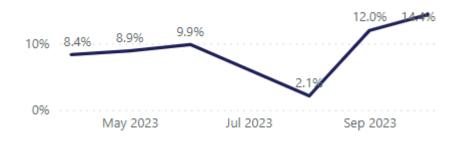
#### **Q7 Transfer**

Was your call transferred from 311? (Yes%)



### High response rate last quarter Percent of calls lower in August due to Build the Budget

#### % Calls opted-in over last 6 months



### Steps taken to improve performance:

- Call monitoring
- More 311 liaisons are transferring residents to the survey than last quarter
- Implemented optional voicemail at end of survey
- Ongoing low-call rating analysis

### Additional steps to take:

Continue to train newly hired customer service liaisons for

### Low-rated Call Follow-ups Initial Findings

- Goal: Better understanding of underlying reasons behind low ratings i.e. qualitative analysis through follow-up surveying
- Methodology: Gather list of phone numbers by each category for each week (through the dashboard), and ensuring there is no duplicate calls
- For the last four weeks, two completed survey calls for each of the following categories:
  - General low customer satisfaction rating
  - Low timeliness rating
  - Unresolved call rating

### Low-rated Call Follow-ups Initial Findings

### **Initial Findings (15 surveys)**

- 7 customers either claimed they had a good experience with their 311 call or were hesitant to report any issues with City customer service
- A mix of low timeliness ratings centered around timeliness of City unit responding to an ongoing service request and queuing for call
- Other feedback:
  - A resident had technical issues reaching 311 within City limits
  - A resident requested for street resurfacing, but potholes were not solving underlying street issue (1600 Jackson block)

# Deep-dive analysis & discussion

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

- 311 Service Portal Request Analysis
- Streets SLA Performance Analysis



### Problem Definition

### **Problem Statement**

The City needs to engage with residents digitally. Residents have a preference to request services and engage with content online without necessarily having to speak with a person or during business hours. The City has not formally marketed the online 311 Service Portal or investigated current 311 Portal usage.

### How might we...

- Inform residents of the 311 Portal
- Increase Service Requests originating from the Portal
- Decrease number of calls to 311

### **Outcome Metric(s)**

- Number of Portal Service Requests
- Number of 311 calls
- % of Service Requests from Portal from each Council District

## Top services requested online

### 1. Christmas Tree Pickup

- 1347 portal requests, 9 phone requests
- 43% of all portal requests
- Accounts for bump in portal requests in Q1 and partly in Q4 for last two years
- Promoted on City Facebook in late December, January

### 2. Pothole in Street

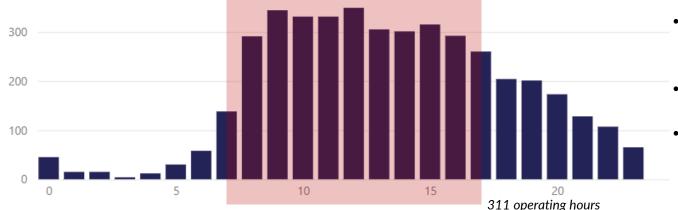
- 794 portal requests, 1627 phone requests
- Seasonal: requests coming largely in Q1,Q2
- Popular requests for both options, but most people still call to report

### 3. Traffic Concern Form

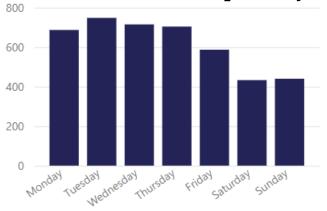
- 726 portal requests, 604 phone requests
- Jump in 2023 Q2 after speed humps launch
- Promoted on City Facebook for residents to fill out
- Confusion with Traffic Enforcement form

### When do residents use the service portal?

#### Total Portal Service Requests by Hour (Eastern Time)



**Total Portal Service Requests by Day of the Week** 



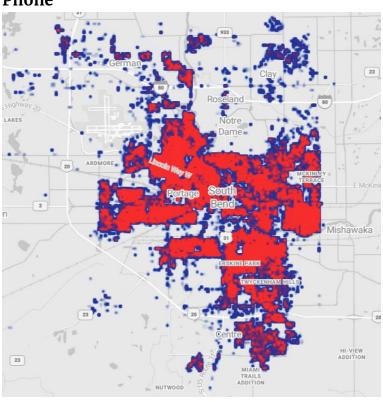
- Residents mainly request services during business hours
- Drop off in requests after hours
  - Not able to see correlation between types of service requested between business hours and after hours
- Portal requests are down by roughly 30% on weekends

## Requests coming from Portal are concentrated in Council District 3 and 4

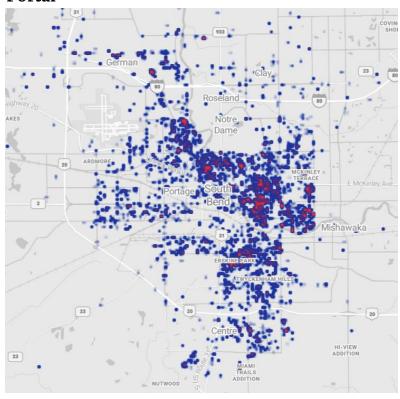
#### Location of service requests by origin, Jan 2021-Oct 2023

Blue (low frequency) -> Red (high frequency). Note: marks where the City team is directed to go and not address of requester.

#### **Phone**



#### **Portal**



### **Feedback from Service Portal**

- Residents can currently submit feedback for the service portal on a Microsoft Form
- Most complaints center on difficulty of navigating the portal i.e. can't find right article, contact, or request form
- Some complaints concern inaccurate information in articles
  - e.g. links are broken, new version of article has not been approved

### Methodology

- Each time a form is filled out in CRM by a liaison or on the service portal by a resident, the request origin is recorded.
- Timeframe of analysis: Jan 2021-Oct 2023
- Using this view in our reporting server for our analysis, we can see:
  - Request origin
  - Service form used in CRM
  - Generated service request id
  - When it was created

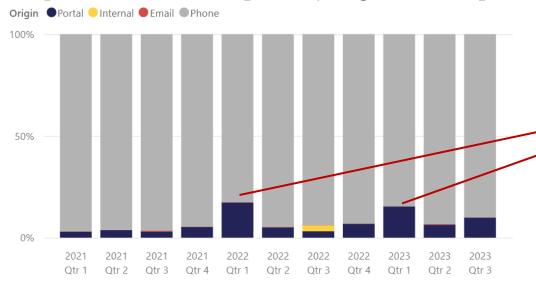
	cosb_originname ∨	cosb_serviceformdefinitionname ∨	cosb_approximatelocation ∨	Organizational Unit	cosb_name ∨	createdon 🗸	cosb_prettyoutput
1	Portal	Abandoned Vehicles	5122 Ford St, South Bend, IN, 46619, USA	Neighborhood Services and Enforcement	P-ZYZRFV-120921	2021-12-10 02:22:47.000	Location: 4 • 5122 Ford St, South Bend, Indiana, 46619 44
2	Portal	Alley Maintenance Request	906 E Dubail Ave, South Bend, IN, 46613, USA	Streets	P-HCKKVA-032121	2021-03-21 04:16:50.000	Location: ↔ • 906 E Dubail Ave, South Bend, Indiana, 4661
3	Portal	Alley Maintenance Request	1237 Lincoln Way W, South Bend, IN, 46628, USA	Streets	P-TBYQNE-020821	2021-02-08 09:15:53.000	Location: d • 1237 Lincoln Way W, South Bend, Indiana, 46
4	Portal	Alley Maintenance Request	306 E Eckman St, South Bend, IN, 46614, USA	Streets	P-XLHJPN-032221	2021-03-22 17:15:38.000	Location: 4 • 306 E Eckman St, South Bend, Indiana, 46614
5	Portal	Alley Maintenance Request	1237 Lincoln Way W, South Bend, IN, 46628, USA	Streets	P-THMZXE-020821	2021-02-08 09:15:57.000	Location: d • 1237 Lincoln Way W, South Bend, Indiana, 46
6	Portal	Parking Violation	1205 S 27th St, South Bend, IN, 46615, USA	Neighborhood Services and Enforcement	P-MBNCXP-020521	2021-02-05 20:25:33.000	Location: d • 1205 S 27th St, South Bend, Indiana, 46615
7	Portal	Traffic Concern Form	1915 Johnson St, South Bend, IN, 46628, USA	Traffic and Lighting	P-QLRWMO-021021	2021-02-10 19:07:59.000	Location: d • 1915 Johnson St, South Bend, Indiana, 46628
8	Portal	Parking Violation	1205 S 27th St, South Bend, IN, 46615, USA	Neighborhood Services and Enforcement	P-BWNYWP-020521	2021-02-05 20:25:34.000	Location: d • 1205 S 27th St, South Bend, Indiana, 46615
9	Portal	Abandoned Vehicles	1006 E Irvington Ave, South Bend, Indiana, 46614	Neighborhood Services and Enforcement	P-DRFNYQ-021021	2021-02-10 21:49:09.000	Location: ℯ・1006 E Irvington Ave, South Bend, Indiana,
10	Portal	Dead Animal in the Street	917 E Ewing Ave, South Bend, IN, 46613, USA	Streets	P-GJVFZQ-032321	2021-03-23 20:58:15.000	Location: ← • 917 E Ewing Ave, South Bend, Indiana, 46613
11	Portal	Traffic Signal Issue	Ralph Jones Dr, South Bend, IN, 46628, USA	Streets	P-PJNLMK-021121	2021-02-11 15:27:09.000	Location: d • Ralph Jones Dr, South Bend, Indiana, 46628
12	Portal	Traffic Concern Form	735 W North Shore Dr, South Bend, IN, 46617, USA	Engineering	P-LKHMVT-121221	2021-12-13 00:34:32.000	Location: d • 735 W North Shore Dr, South Bend, Indiana,
			<u></u>				£

### **Findings**

#### **Count of Service Requests by origin**

SR Origin	2021	2022	2023	Total
Email	52	40	34	126
Internal	1	184		185
Phone	20322	19989	17311	57622
Portal	783	1655	1876	4314
Total	21158	21868	19221	62247

### Proportion of Service Requests by origin for each quarter \*



- 311 Portal use has grown slightly over last three years
- As of October, 9% of service requests originate from the Portal in 2023
- Q1 sees highest portion of service requests originating from the portal
- 33 service forms are available externally for residents, but vast majority are for three types services.

#### Q1 Portal Request Benchmarks

2022 Q1: 833 (17%) 2023 Q1: 802 (15%)

### **Key Takeaways**

- The 311 Portal is still being used by some residents even without extensive promotion.
- From preliminary data, proportion of 311 portal usage is lower in West Side.
- Many service requests that are available in the 311 portal are not being used by the public.
- The 311 Portal has potential for residents to file requests after hours.
- Potential Performance Targets for 2024
   Q1:

Target Increases	Net Increase in Portal SRs	Total Portal SRs
5% more than 2022	+ 40	842
20% more than 2022	+160	962

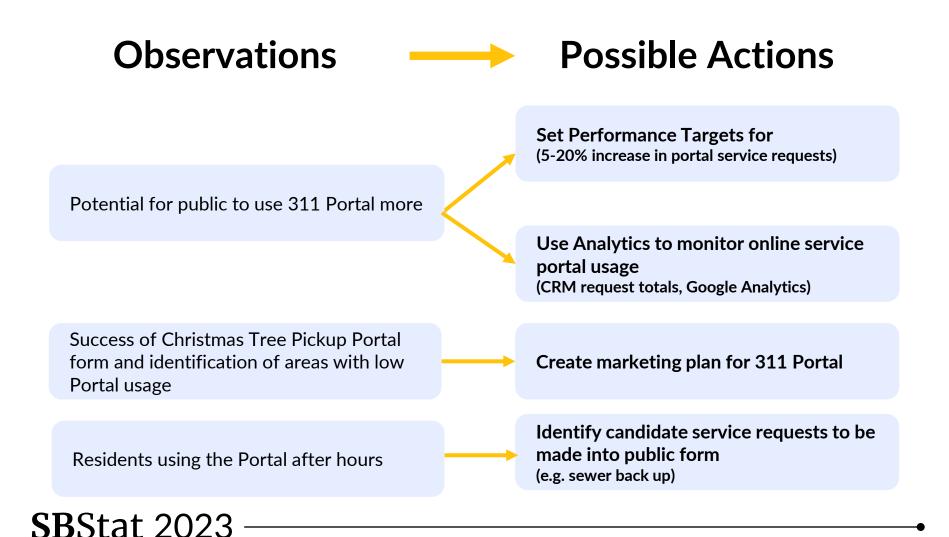
### Best Practices Review



Screenshot from a City facebook post last year directing residents to fill out the form on the 311 Portal

- Facebook to highlight popular services that can be requested by residents (Christmas Tree Pickup)
- Boston residents can download the <u>Boston 311 App</u> to report and track service requests on mobile
  - Idea: Assess percentage of residents who would request services on their phone
- Fort Wayne <u>categorizes service request</u> <u>types</u> visually without having to scroll down to find

### Proposed action plan



### **Taking Action**

The problem	The City needs to engage with residents digitally. Residents have a preference to request services and engage with content online without necessarily having to speak with a person or during business hours. The City has not formally marketed the online 311 Service Portal or investigated current 311 Portal usage.	
Outcome metrics	<ul> <li>Number of Portal Service Requests originating from the Portal</li> <li>Number of 311 calls</li> <li>% of Service Requests from Portal in each Council District</li> </ul>	
Action items	<ul> <li>Set Performance Targets for 311 Portal</li> <li>New panel in 311 dashboard visualizing Portal KPIs</li> <li>Establish marketing plan for 311 Portal</li> <li>Identify Service Request forms to be made public</li> </ul>	



### Streets SLA performance analysis

Review of performance data captured from CityWorks and CRM for Potholes and Alleys

### Problem Definition

#### **Problem Statement**

The City has not evaluated Streets service request performance using CityWorks data before. This is a problem for City leadership since the Streets team primarily uses Cityworks to close out work orders and does not report performance data into the 311 CRM, so it is not clear if the City has good performance targets (SLAs) for priority service requests like filling a pothole or alley maintenance.

### How might we...

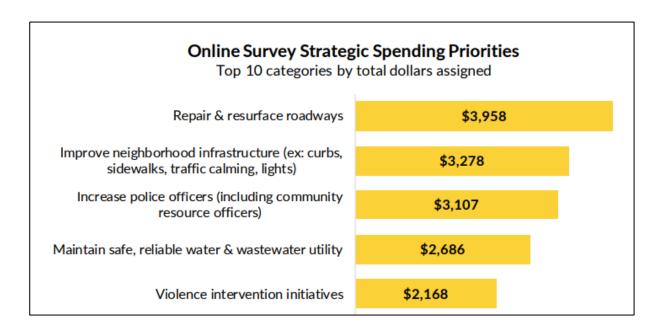
- Set feasible performance targets for filling potholes and alley maintenance?
- Identify areas of improvement for Streets service requests?

### **Outcome Metric(s)**

- Higher percent of service requests completed on time
- Less unresolved service requests

### Why this matters

- For residents, resurfacing and repairing roads is the top priority in Build the Budget online survey and voicemails.
- 'Pothole in Street' and 'Alley Maintenance Request' service forms were filled out 840 and 601 times, respectively, in a 12-month period
  - Two of the top fifteen services requested.
  - Both service requests are integrated with CityWorks.

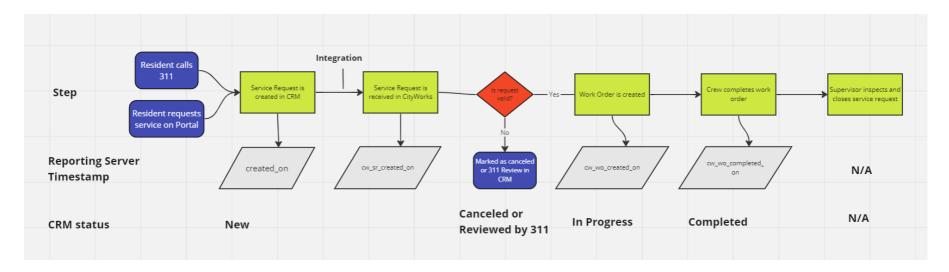


### Pothole/Alley Current State Simplified Process Map

#### **Definitions:**

**Service Request (SR)**: Request from resident for a City service

Work Order (WO): Authorization for a crew to be sent to complete work or respond to request

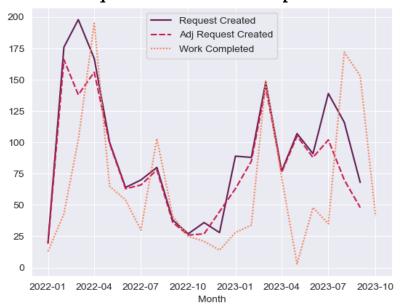


- Today's analysis uses the timestamps coming from CRM and Cityworks joined data in the reporting server
- Calculated completion time = Cityworks WO Completion timestamp CRM service request creation timestamp
- We are not using actual CityWorks SR completion since a supervisor inspects the streets days or weeks after the work was completed.
- Time frame: **January 1, 2022 -> October 30, 2023** with focus on Spring (Mar-Apr) and Fall (Aug-Sep) high-activity months.

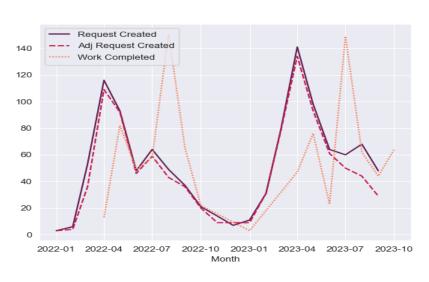
### **Overview of Completion Data**

74.8% Actual Completion Rate87.1% Adjusted Completion Rate

#### Pothole requests created and completed



#### Alleys requests created and completed



Actual: Percent completed/canceled out of all CRM requests.

Adjusted: Percent completed out of requests in CityWorks.

Higher due to a handful of CRM->Cityworks integration failures that are being addressed.

### **Time to Complete Request**

**27 days** to complete a pothole request on average

60 days to complete an alley request on average

### Factors causing low timeliness:

- Requests made during off season accumulate
  - We can see that potholes are addressed in significantly less time during major patching weeks in Fall and Spring
- Invalid requests are not closed immediately
  - · Request time outliers pushed the mean time
  - Pothole median: 13 days, Alley median: 53 days
- Increased frequency of pothole requests in Summer 2023 were not addressed until late Fall
- For Alleys, major spikes in requests in spring don't get addressed until August or July
- Not included: Streets repairs many potholes not reported via 311.

### Avg. Number of days to complete a pothole request by month

	Month	2022	2023	
	January	6	1	
	February	5	8	
Г	March	8	14	
L	April	6	7	
	May	9	49	
	June	16	39	
	July	29	80	
Γ	August	9	51	٦
ı	September	9	57	1
	October	4	28	
	November	7		
	December	21		
	Total	8	31	

## On-time percentage given current SLA framework

- 13% Pothole requests completed within 48 hours
- 4% Alley requests completed within 48 hours
- Unsurprisingly, most pothole requests completed within 48 hours are for potholes reported on arterial roads
- Discussion: Does Public Works or other departments use different benchmarks for pothole completion time depending on street type?

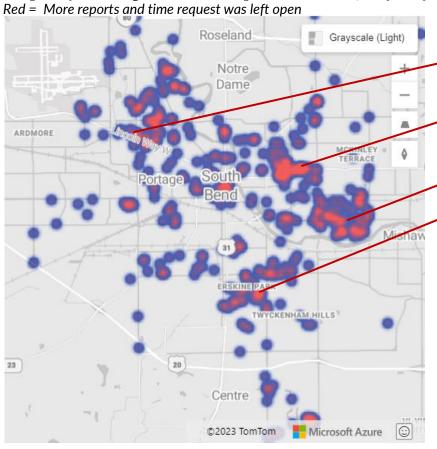
#### Streets Service Requests by Cityworks Completion Time Category

See Appendix for how each category is defined.

name	Alley Maintenance Request	Pothole in Street
cw_completion_time_text		
Early	6	18
Late	13	47
On time	12	73
Very early	18	111
Very late	859	1192

## Increased Pothole requests in Summer 2023

Frequency and length of time of reported Potholes, May-July



- Clusters of pothole reports along certain neighborhoods/roads:
- Far Northwest Neighborhood centered around College St.
  - McKinley Ave between Ironwood and Twickenham
  - River Park neighborhood
  - **Erskine Park**



### Work order timeline takeaways

- SRs outside city limits were not closed (Most coming from Portal)
- Many duplicate service requests appeared for arterial intersections.
- During non-peak seasons if there is availability, Streets would select a handful of potholes to be repaired for that given day.
- During peak seasons, all eligible potholes were put to work orders at once and crews would go through each designated area over the course of a week or two



## **Proposed Process Improvements for Reporting**

Observations	Possible Actions
Actual Pothole times differ from current SLA targets	<ul> <li>Consider lengthening SLA time target to be more realistic</li> <li>Create additional performance metrics depending on time of year and priority</li> </ul>
Some potholes are marked as assigned as a work order for several days before completion	<ul> <li>Assign work orders at the beginning of the week when a crew is expected to go to a neighborhood.</li> </ul>
Residents are reporting potholes in the 311 Portal that are out of city limits or the responsibility of INDOT.	<ul> <li>Automatically filter out invalid service requests in integration</li> <li>Create map visual of state roads that are not maintained by the City accessible in the KBA</li> </ul>
Potholes that are reported off-season skew average time to complete.	<ul> <li>Use on-hold status during off-season</li> <li>Share Streets anticipated schedule in Pothole knowledge article</li> </ul>
Sometimes there are several reports for a single pothole.	Create plan for consolidating duplicate requests without interfering with completion time
Streets team will fill non-reported potholes when out fulfilling reported potholes.	Consider adding number of potholes filled/alleys grading as an additional performance metric
Most Alley requests are filed in Spring	Consider moving Alley grading to Spring

### **Taking Action**

The problem	The City has not evaluated Streets service request performance using Cityworks data before. This is a problem for City leadership since the Streets team primarily uses Cityworks to close out work orders and does not report performance data into the 311 CRM, so it is not clear if the City has good performance targets (SLAs) for priority service requests like filling a pothole or alley grading.
Outcome metrics	<ul> <li>Higher percent of service requests completed on time.</li> <li>Less unresolved service requests</li> </ul>
Action items	<ul> <li>Lengthening current Streets SLA times</li> <li>Mark service requests as "on-hold" during offseason</li> <li>Assign work orders on a more frequent basis</li> <li>Consolidate duplicate requests and link duplicate requests back to initial SR ID.</li> </ul>

### III. Changes to SBStat in 2024

Starting in 2024, we'll be taking a less meeting-centric approach to performance management.

### We're going from this...

- Regular, quarterly meetings with a big group
- Focus on cross-departmental performance management projects directed by the Mayor's Office
- Work delivered and championed by I&T
- Overall, very strategically focused performance management program

### ...to this

- Automated emailbased dashboards, reports (with an option to meet if needed)
- Mix of Mayoral projects and Department-specific projects
- Work delivered by I&T and championed by the Department
- Overall, more operationally focused performance management program

## Why the Change?

• Efficiency. Less meetings! Less Decks! Less scheduling, more services!

• Better fit for our data culture. Unlike other cities, our data culture is more democratized across departments and at every level of government and we want the program to mirror and respect that. These conversations don't just happen on the 14th floor of CCB.

## We'll do more of this >>>

The UAP Dashboard is a monthly email that goes to a cross-section of Public Works, A&F, Mayor's Office and I&T to monitor the health of UAP and utility delinquencies.

When delinquencies go too high or the UAP program gets close to red, we trigger a meeting.







#### PROGRAM OVERVIEW

3,032 Customers Enrolled \$123.04 Aug Amount Part Due Enrolled by Tier

350 (BNU)

456
(550)

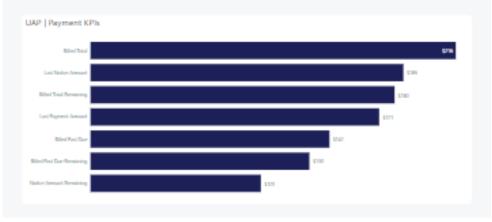
- 1565 (BNU)

97.2% Accounts Paid On Time 14.8% Accounts Fully Paid Bill

UNPTier	Billed Total	Last Payment Amount	Billed Past Due	Billed Part Due Remaining
Tier t	\$241	(\$141)	\$157	\$170
Tior 2	\$109	(\$139)	\$112	\$47
Tior 3	\$196	(\$159)	\$120	\$110
Tior 4	\$223	(\$197)	\$150	\$139

#### PAYMENT BEHAVIOR

Comparisons are made between today's average and one month prior's average



## Next Steps

Department and Division Heads should think about your Department-specific goals for next year.

- What data and teams do you want to focus on?
- What change do you or one of you Directors/managers want to champion?

We can give you the templates/maps/reporting you need to drive that change.

# Celebrating our values

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

## Celebrating our Values

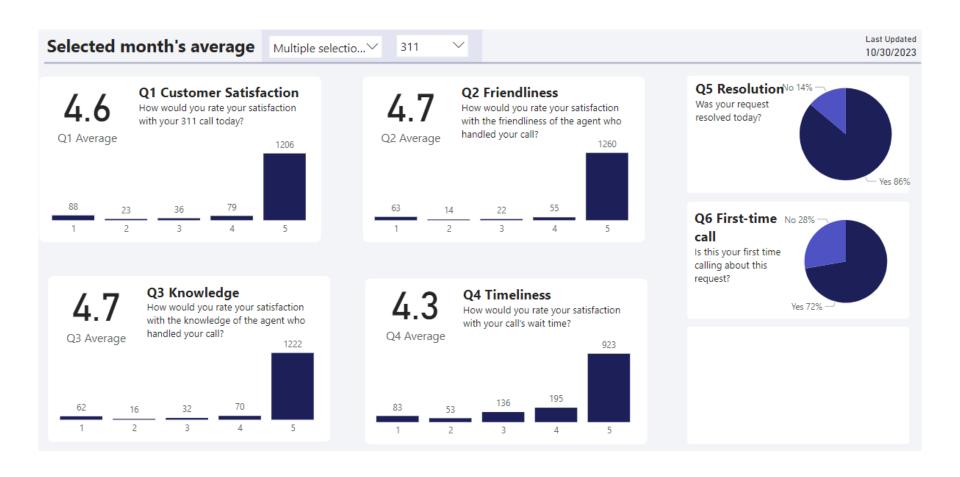
- Increase in post-call survey uptake to beyond pre-Build the Budget levels!
- Kudos to Streets, Sewers, and Engineering teams for their willingness to engage in data routine meetings to improve City services reporting!



## Appendix section

- Post-call survey screenshots
- -Streets analysis code

## CoSB Post Call Survey Results | 311

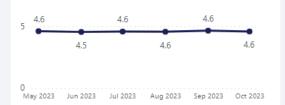


## CoSB Post Call Survey Results | 311

#### Averages over last 6 months

#### **O1 Customer Satisfaction**

How would you rate your satisfaction with your 311 call today?

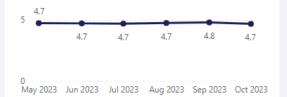


How would you rate your satisfaction with the knowledge of the

May 2023 Jun 2023 Jul 2023 Aug 2023 Sep 2023 Oct 2023

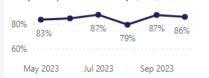
#### **Q2 Friendliness**

How would you rate your satisfaction with the friendliness of the agent who handled your call?



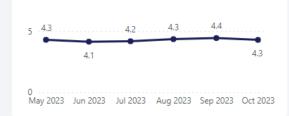


Was your request resolved today? (Yes%)



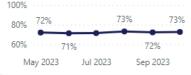
Q4 Timeliness

How would you rate your satisfaction with your call's wait time?



#### Q6 First-time call

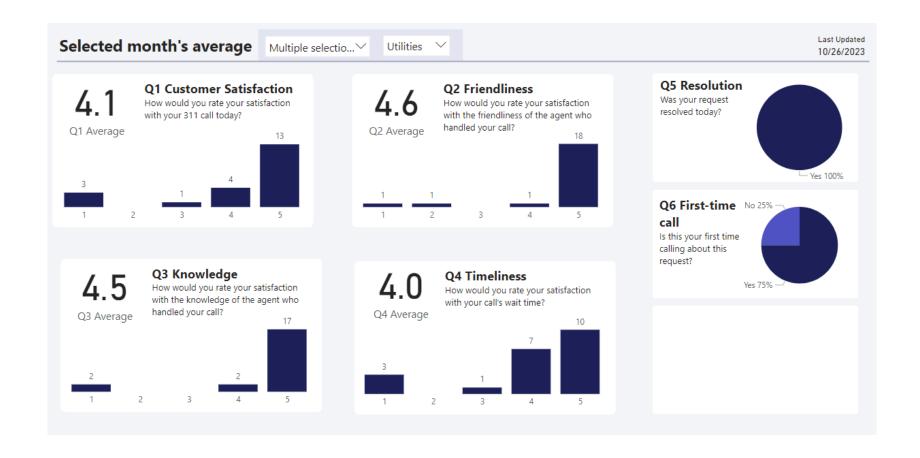
Is this your first time calling about this request? (Yes%)



Q3 Knowledge

agent who handled your call?

### CoSB Post Call Survey Results | Utilities



## CoSB Post Call Survey Results | Utilities

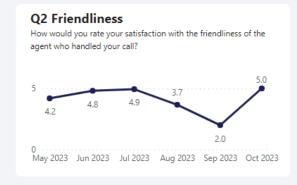
#### Averages over last 6 months

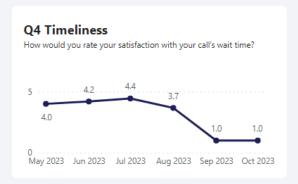
# Q1 Customer Satisfaction How would you rate your satisfaction with your 311 call today? 5 4.6 3.7 4.8 4.0 1.0 1.0

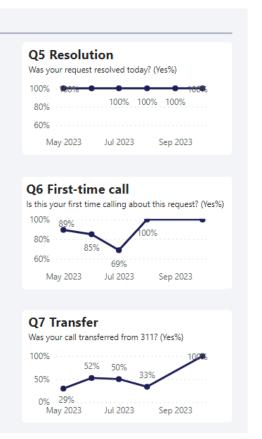
May 2023 Jun 2023 Jul 2023 Aug 2023 Sep 2023 Oct 2023



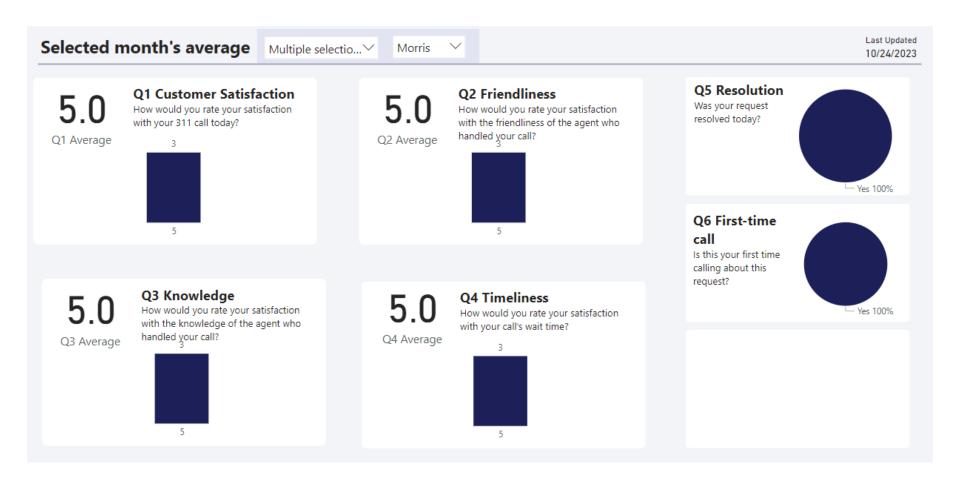
May 2023 Jun 2023 Jul 2023 Aug 2023 Sep 2023 Oct 2023







## CoSB Post Call Survey Results | Morris



## Completion Time SLA Categories

- When a service request has been completed, the completion time as a percentage of the stated SLA determines the time category:
  - Very Early: 0-60% of SLA Time
  - **Early**: 61-80% of SLA Time
  - On-Time: 81-120% of SLA Time
  - Late: 121-140% of SLA Time
- By default, a service request has an SLA time of 48 hours to complete.
- Example: If an abandoned vehicle service request is completed in 60 hours, it is classified as a Late service request (60 is 125% more than 48 hours).

## Streets data analysis

#### SQL Query to construct table for analysis

#### Azure Data Studio Notebook link