IT/Utility Joint Committee Meeting

April 30, 2024

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Customer Service Overview + Recent Changes

Overview of UAP

Overview of Customer Success Portfolio, KPIs, Goals

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First, a Flex

South Bend's Department of Innovation & Technology just won the Mission 41K Exceptional Employer Mira Award for 2024!

The Mira Awards is an Indiana Award Program run by Techpoint recognizing the "Best in Tech" on any given year. It is very cool that a public sector tech team won this award!

Thank you to the IT Committee for supporting us! We'd like to take a picture with you after this meeting!

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The Team & Recent Changes

About Customer Service & Success

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I&T Mission

South Bend's Department of Innovation & Technology (I&T) leverages technology, data, and design to empower a thriving City workforce and improve quality of life for the region.

As a centralized IT and innovation team, we serve City departments. In addition to providing core IT services like hardware, technology support, security, and network maintenance, we help city teams procure or develop new solutions, improve processes, use data to forward goals, and digitize city services.

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I&T Mantra

Listen First, Build With.

In 2019, our Department chose this mantra because we believe it represents the human-centered design and collaborative culture we aim to infuse into all our work.

Reminder: I&T is an internal service department

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Themes for 2024 I&T Reorganization

There are 4 major themes that most proposed changes in I&T structure and personnel relate to:

1. Addressing capacity gaps in product maintenance & security
2. Creating a dedicated digital team to address weaknesses in web and embrace future opportunities in low code and resident experience/communication
3. Absorbing Commuters Trust into city operations
4. Centralizing frontline customer service workforce

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Re-org Priority: Centralized, Future Forward Customer Service Team

In 2023, the frontline Customer Service team was (1) not as centralized as it could be for resident ease and (2) not yet evolving with the changing nature of that work

Solution: Centralized Customer Service Team, absorbing 6 Water Works Customer Service Staff, with a 2024-2025 plan to (1) train workers to staff the future City Hall One Stop Shop (2) take payments across city teams (3) deploy a new Case Management model and other modernizations

Given emerging technology and the evolution of customer service support tasks, the team will also receive training in IT project management, product management, digital comms, etc.

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2024 Org Chart for I&T

- 47 FTEs
  - 6 absorbed (red)
  - 7 net new (yellow)
  - Title Changes (yellow outline)
- Note 2023 Q2 change:
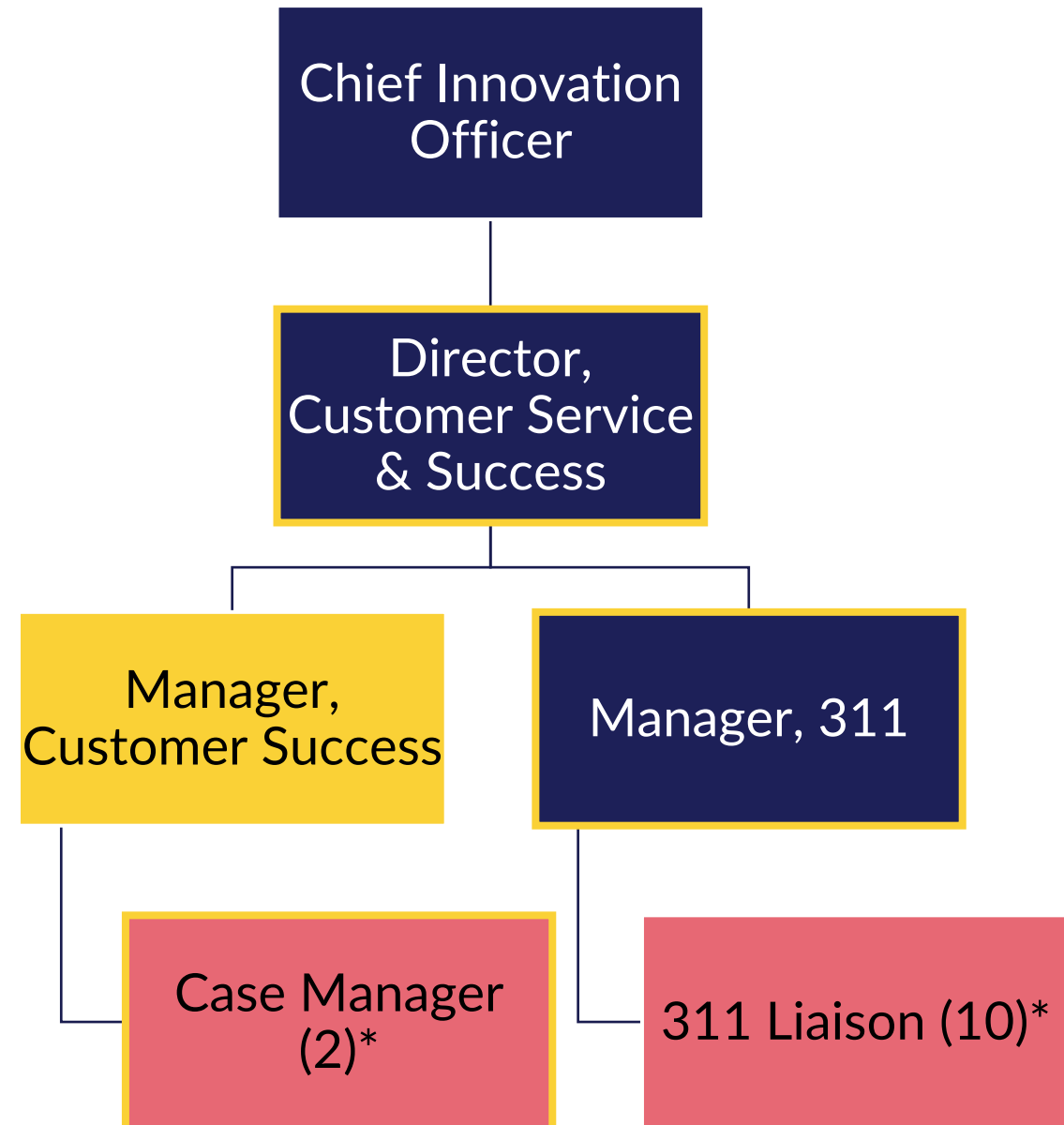 - *Title change only Design Specialist > Web Manager*

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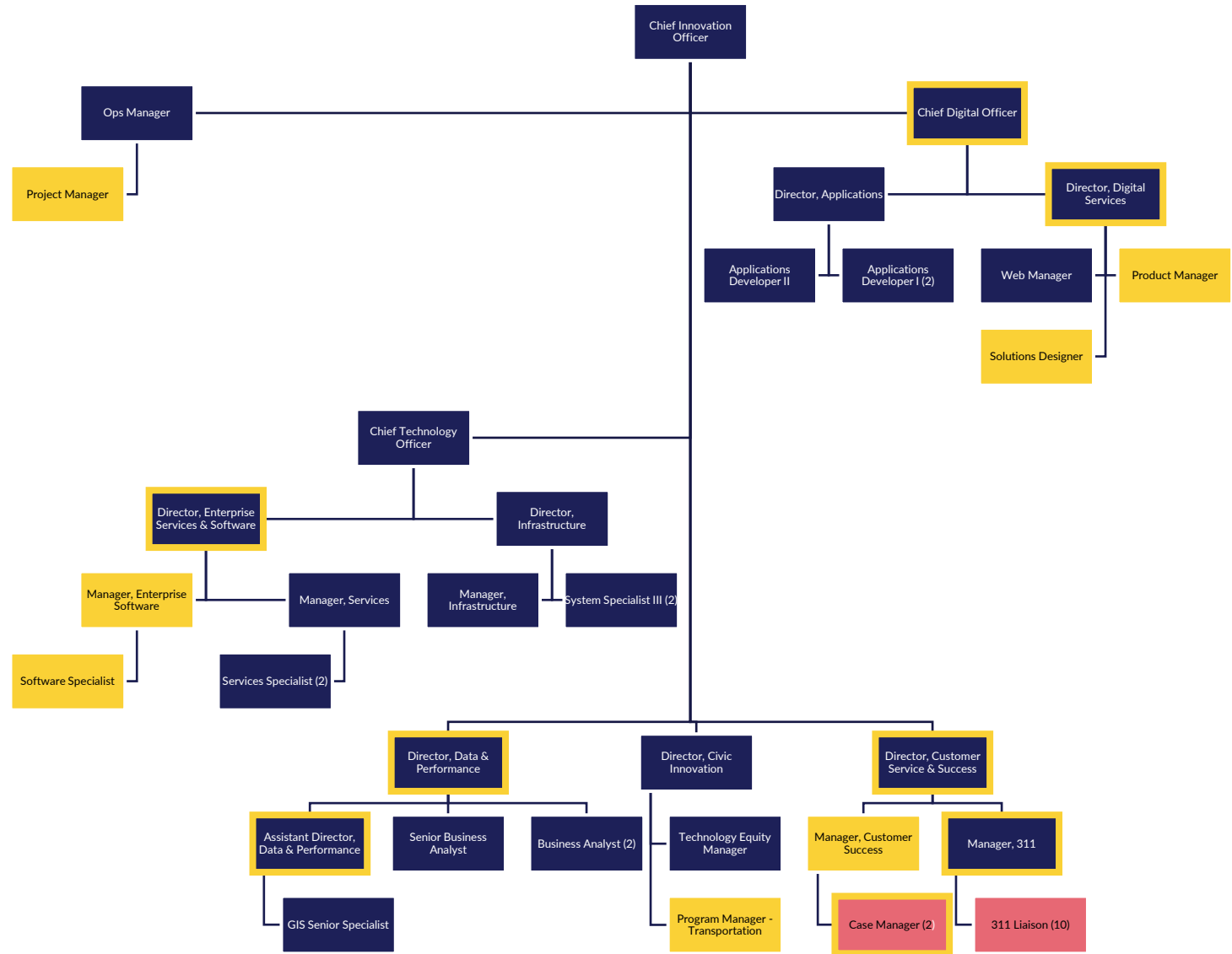
2024 Org Chart for I&T

Zoom in on Customer Service

Changes: Merging all frontline Customer Service personnel on one team will:

- Allow the city to create a One Stop Shop digital and in-person experience
- Pursue centralized/streamlined payments across resident services
- Shift from a reactive 311 model to a proactive, holistic case management model
- Create a foundation for customer service digital innovation while future-proofing our structure and workforce

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Chief Innovation Officer

Director, Customer Service & Success

Manager, Customer Success

Manager, 311

Case Manager (2)*

311 Liaison (10)*

1 Case Manger + 5 311 Liaisons absorbed

UAP Overview

History, Enrollment Numbers

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UAP = Utility Assistance Program

Old Version of UAP

1. Wait until September
2. Apply using LIHEAP's lengthy application submitting cumbersome documentation that isn't relevant to UAP
3. Wait 2 months
4. Call the city to seek assistance
5. Call Real Services after being redirected
6. Wait another month
7. Without any notification or receiving an enrollment letter, the participant receives the UAP benefit

Future Revitalized UAP

1. After learning about the UAP program, the participant is able to apply the same day with an intuitive application that takes less than 20 minutes and requires no documents.
2. Wait 1 week
3. The participant receives an enrolment letter notifying them that they've been enrolled UAP and suggesting other social assistance programs they're likely to be eligible for
4. They are automatically, easily re-enrolled every year

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Our Mayor Greenlit these 9 Program Changes in 2021

Detach from LIHEAP

Shorten application

Automate re-enrollment

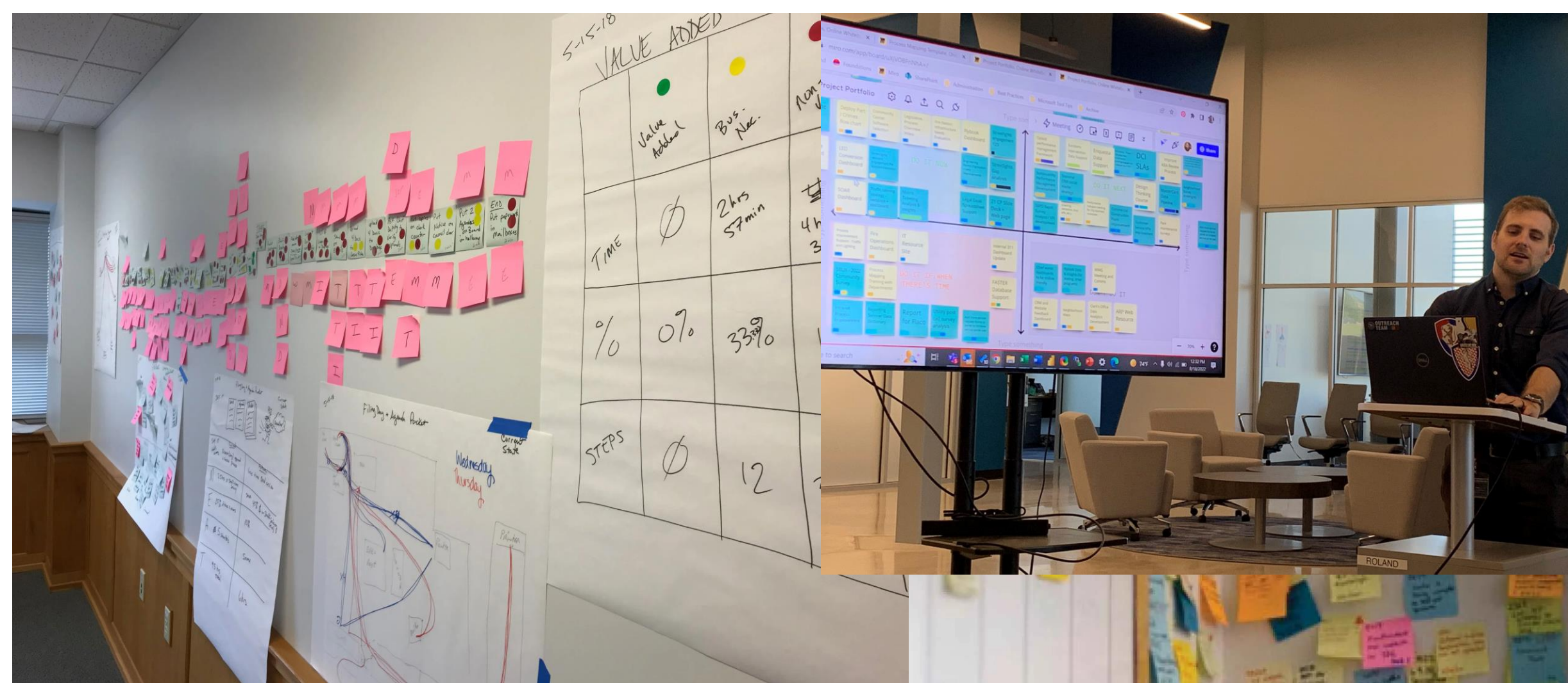Expand income eligibility

Create a Spanish application

Integrate with Lead

Update program name

Send enrollment notices

Year-round enrollment period

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What we built: A New UAP Process + Application

We prototyped the application with users

Our team worked with nonprofits, neighborhood organizations, service organizations to make sure our application and process worked for our residents.

We also created a results-driven contracting model with community partners to make sure uptake was healthy.

2023 GovTech Best in Indiana App

Despite Improvement, Outreach was Needed

In 2022, we started a few things:

- **Assistance STAT meetings**, tracking uptake of UAP and other assistance programs
- **Marketing initiatives** with Utility/PW
- **Assistance Working Group**, training other social service organization on the UAP app
- **Assistance Lead**, used AR dollars to fund a dedicated person to increase uptake of City programs
- **Data-Driven Outreach**, results driven contracting + canvassing to undersubscribed areas
- **UAP Referral Program**, giving partnered nonprofits $ for UAP referrals

There are several possible opportunities to investigate how to improve performance

Performance highlights and insights

- There are several tracts with subscription rates below 10% of the estimated eligible population, the most populated ones being 3.02, 11, and 111
- Tracts with the highest uptake are 6, 19, and 30
- Census Tracts with high levels of water bill delinquencies: 34, 24, 4, and 2
- After the LIHEAP/LIHWAP deadline, The Outreach Team has continued to focus on flyering in census tracts with the highest percentage of water bill delinquencies with the assumption that a high proportion of househo... receiving a discount o... forward

Potential next steps / strategies

- Further investigate reasons for low enrollment in undersubscribed tracts
- Continue with outreach focused on increasing UAP subscriptions on target tracts
- Use data to examine how our outreach efforts impact new enrollment numbers
- Engage with trusted partners in undersubscribed areas for input on outreach strategies
- Work with legal to address the "utility account in our...

SBStat 2022

A relatively new program, UAP still has a lot of potential for growth - subscribership is well below more established programs

15,221 — Eligible Households
12% (1,847) — Enrolled
13,374 — Potential for outreach
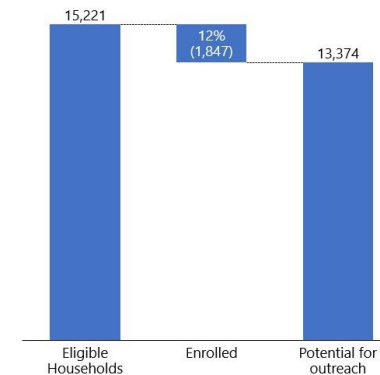
How we calculate performance

| Eligible base | # of HHs at FPL equivalent to 80% AMI, by census tract |
| Subscriber base | # of HHs enrolled in UAP by census tract |

Sources: 2020 Census, South Bend City - Utilities

SBStat 2022

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Percent Eligible Households Enrolled (2022)

Current State UAP Enrollees + Targets

- 2,895 accounts enrolled in UAP as of April 29, 2024
  - doubled the 2022 numbers, but a long way to go

- We estimate ~15K households are eligible (aka are at 80% AMI or below for our County), *but*
  - most of our sign-ups are for tier 3 (19.25 off bill, 30-35% AMI) and 4 ($25.50 off bill, 0-30% AMI)

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Enrollment in April 2024
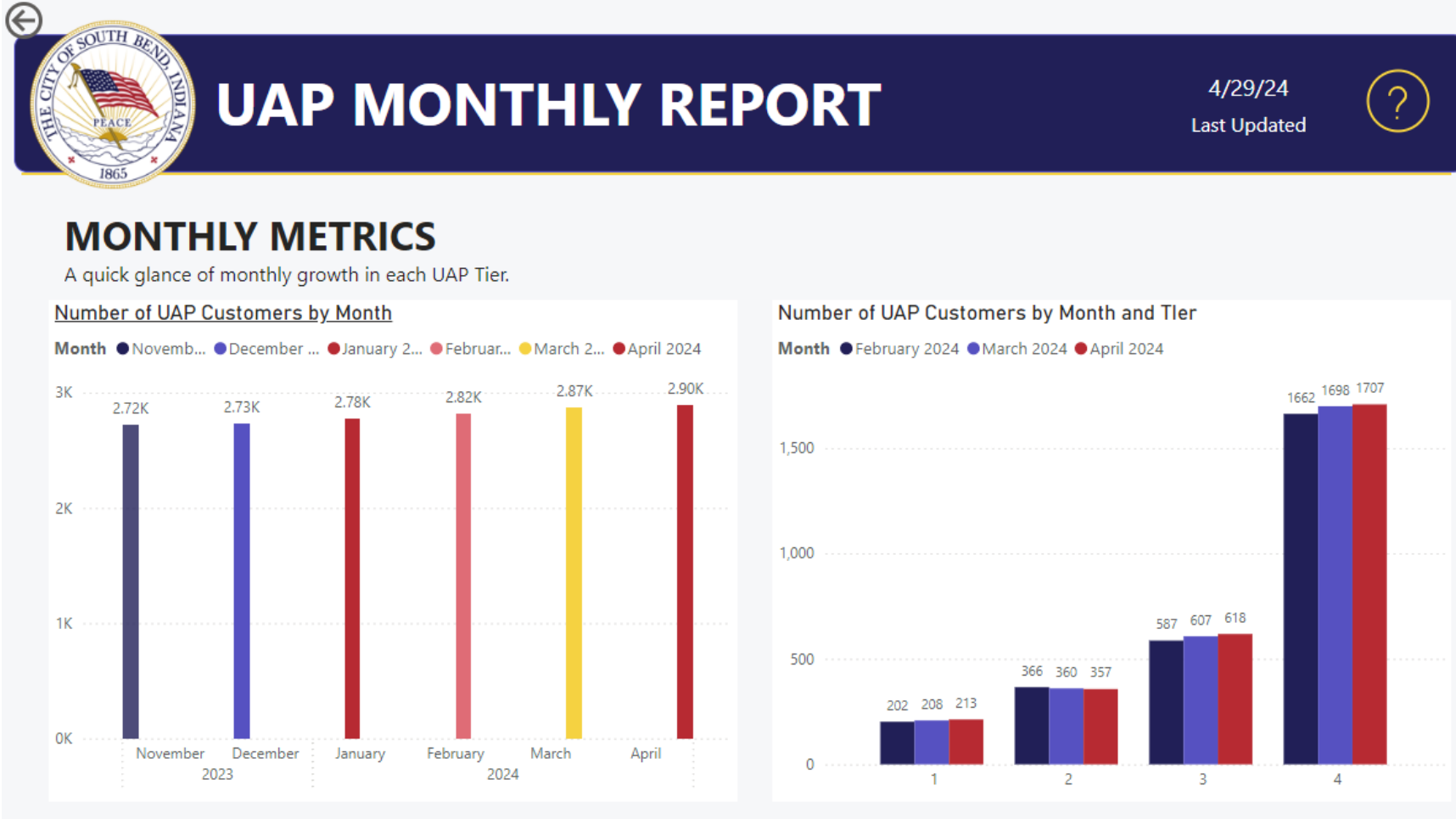
We have work to do…

- In 2023, we diverted some UAP outreach/personnel muscle to the Affordable Connectivity Plan (ACP) sign-up work
- We want to increase UAP sign-ups in 2024 again

We would love the IT and Utility Committee's assistance! Recommendations for partners, outreach, events, etc. very welcome!

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Customer Service & Success Goals & Portfolio

What we're up to!

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Customer Service & Success Portfolio

Initiative	Description	Partners	Timeline
Case Management – New Residents	Pilot, testing, projects, SOPs for streamlining new resident experience	Change Agents Training, Data & Performance	2024
Case Management – Vulnerable Households	Pilot, testing, projects, SOPs for streamlining vulnerable household experience	Change Agents Training, Data & Performance	2024
Cash-taking Kiosks	Deploy cash taking kiosks to City locations	Marketplace.city, various City Teams	2024
Payment Process Centralization	Take on OVB payments	OVB, Neighborhood Services, enFocus	2024
Colfax office "Beta" OSS	New ipad stations, CX flow, payment intake, process improvements	ESS	2024
Paper form modernization/overhaul	Creating digital version of paper only or in-person processes	Digital Team (Apps, DS), Legal, Utility	2024
Drive thru winddown	Engaging with the small number of users of the drive thru to support them before it closes	Civic Innovation	2024

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Customer Service & Success Portfolio (cont.)

Initiative	Description	Partners	Timeline
Queue management/scheduling system onboarding, testing	Centralized queue management and scheduling platform for OSS and City Teams	Marketplace.city, Building, OVB, Business Licensing, other teams	2024
OSS Space and CX Design	Overall flow, feel, experience for new City Hall	Building, OVB, Business Licensing, other teams	2024 - 2025
External GenAI Chatbot	Chatbot for City Services, information	NA	Postponed
Digital OSS	A digital complement to in-person OSS; an account-based experience for residents to see their services, requests, information, etc.	Digital Team (Apps, DS)	2025
Streamlined Translation Services	Internal Process for quick review of GenAI created document translations	Digital Team (Apps, DS), La Casa, Mayor's Office	2024
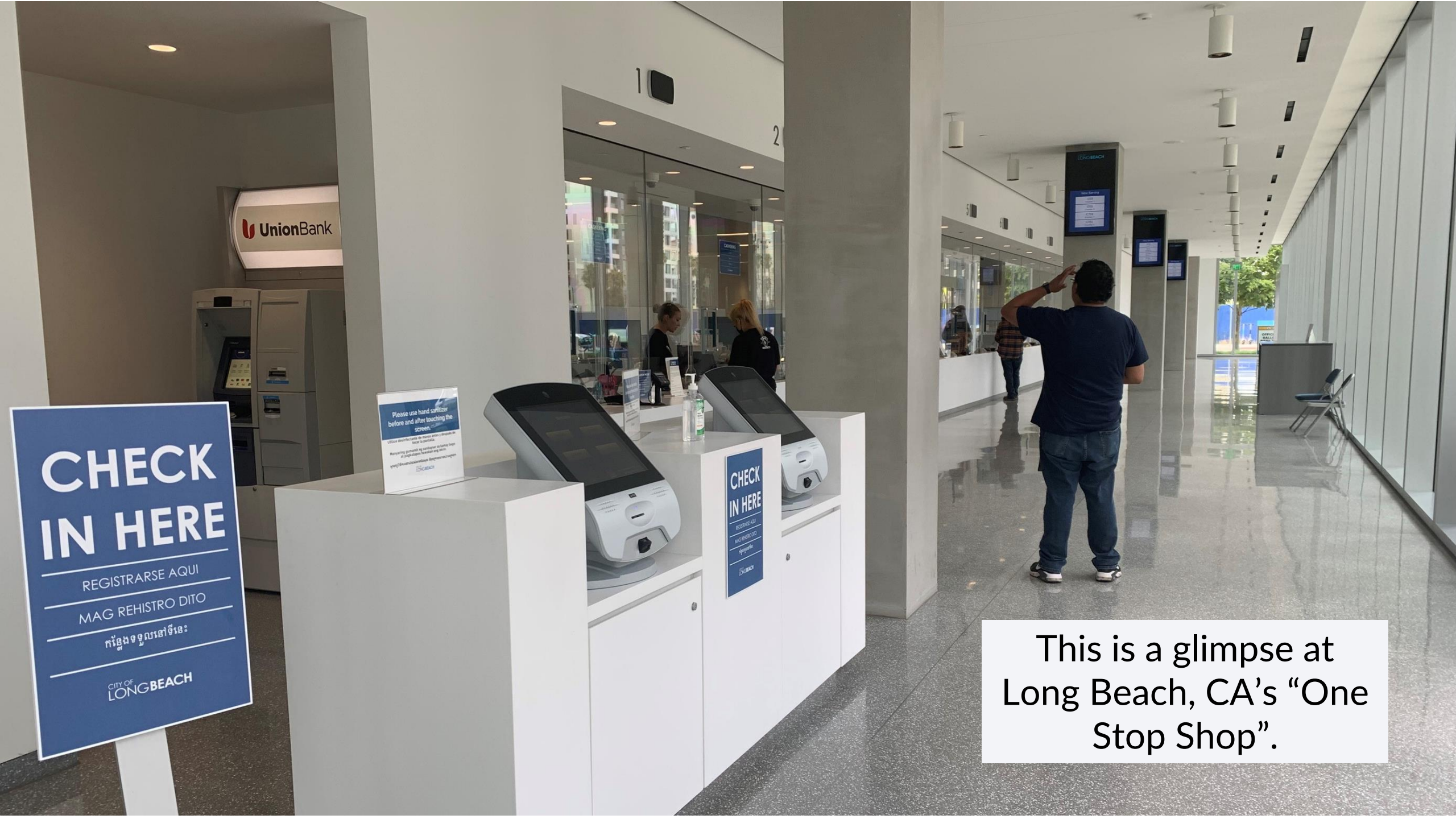
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This is a glimpse at Long Beach, CA's "One Stop Shop".

Projected vpw by operation

Business Unit	Lobby Reception	Storefront	Payment Dropbox	Document Pick-up/Drop-off	Appointments	Ad hoc table
Building				12	18	
EEE	11					
Engineering	15					
Human Rights	10			10		
Neighborhood H&H	7	5		5		
Neighborhood S&E	22	16	2			
OVB		13	4			
Water Works Utilities		532	115			
Zoning		16			8	
Total	**64**	**581**	**121**	**26**	**195**	**3**

We started working with City Teams to strategize the streamlined physical and digital "One Stop Shop" customer experience

Goals + KPIs

Goal	KPI/Measurement Instrument	Why?
Decrease Call Volume, Increase Online Use	Lower # calls, Increased % of requests online	Saved time, efficiency
Increase Auto Pay for Utility	% customers in auto pay	Saved time, efficiency, better CX
Increase UAP sign-ups	% eligible UAP uptake	Prevent shut-offs, economic shocks
Stand up case management SOPs for New Residents	# referral partners, reported improved experiences	Better experience for movers, less calls, saved time
Stand up case management SOPs for Households in Need	# referral partners, reported improved experiences	Connect resident in need to more resources, streamline their experience

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Goals + KPIs (cont)

Goal	KPI/Measurement Instrument	Why?
Great customer service interactions	4.5+ Post-call or post-visit ratings	Everyone should have a great interaction!
Reactive >>> Proactive Activities	Increase ratio of proactive activities (ex: making calls, attending events, CX improvement projects) to reactive activities that should become more self service, more automated (answering traditional 311 calls)	The future of government customer service is proactive

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A final ask

We are engaging with recent residents who have moved into the City in the last 1-2 years! We are asking for their feedback as we redesign our new resident onboarding process.

Please help us recruit! Direct them to this form: southbendin.gov/newresident <<< We are hosting a focus group session at Mayor's Night Out next week, 5/9 at Washington High School

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Any further questions?

Please email CIO Denise Linn Riedl at driedl@southbendin.gov

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Appendix

Extra slides and details

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More Reading – I&T Reports & Background

- You can read a case about the creation of our Department
- Link to the Department's Medium Blog
- Transparency & Performance Page

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