

Service Business Plan



Service Name	Service Burlington	Service Type	Public
Service Owner Name	Deb Caughlin	Budget Year	2017
Service Owner Title	Manager of Service Burlington		

Service Description

A public service to respond to inquiries and manage payments such as taxes, marriage licences and death registration. Provide transparency through Freedom of Information requests and management of corporate records.

Current State

Customers & Their Expectations	<p>This service is delivered to:</p> <p>The public, other City Services and local businesses.</p> <p>Customers want the following:</p> <ul style="list-style-type: none"> • Efficient, convenient and friendly service at their first point of contact from knowledgeable and courteous staff • Many services and information available online • Products and services that immediately resolve their service needs • Transparency, consistency and accuracy • Advice, consultation and support for corporate records management • Assurance that the city is collecting and storing public records while maintaining personal privacy
Existing Service Delivery	<p>The Service Burlington provides:</p> <ul style="list-style-type: none"> • Answers to a variety of in-person and phone general inquiries, redirecting calls to the appropriate service areas when subject matter experts are needed; phone support during emergencies • Marriage licences and death registrations, in partnership with the province • Cashiering services for dog licenses, tax payments, accounts receivables, commissioning, recreation services, property information requests, parking permits and tickets, etc. • Oversight of municipal compliance with Municipal Freedom of Information and Protection of Privacy Act and processing of Freedom of Information Requests ensuring transparency of corporate information • Training, consultation and operational support to staff on records information asset management • Copies of records and archives access for the public and staff
Existing Customer Engagement Tools / Methods	<p>In-person service at the Service Burlington counter, email, phone, website, online forms, customer service surveys</p>

Is this Service Provincially Legislated?	Yes Municipal Act, retention of records section 254 (1) Municipal Freedom of Information and Protection of Privacy Act Vital Statistics Act
For this Service are there Approved Service Standards?	Yes Vital Statistics Act and Municipal Freedom of Information and Protection of Privacy Act

Sub-Services

Cashiering	General phone reception, general email inquiries Tax: Payments/inquiries/statements; dog licences; commissioning, accounts receivable, parking ticket and permit payments, recreation registrations, property information requests
Vital Statistics (Provincially Legislated)	Marriage licences and death registration
Records Management (Municipal Act)	Information, guidance and support to all City of Burlington staff who may create, use, store, retrieve and dispose of corporate records. Records management, records offsite storage, by-laws, Freedom of Information requests. Providing public access to corporate records and archives through requests, routine disclosure and open data.

Recent Continuous Improvement Initiatives

The corporate customer service strategy was approved in 2016 and provides the initiatives for future customer service improvements.

In 2015 a new records retention by-law was approved with the major impact occurring in late 2015, early 2016. Training and consultation with staff on the records retention by-law and off-site records storage has resulted in a greater knowledge of proper storage procedures and understanding of corporate records as well as a reduction in the storage of records that are no longer of business value to the corporation.

The Customer Service Committee developed a corporate standard for customer service survey questions based on industry standards and provided this to all staff for their use as well as implementing it on the city's website and with online transactions.

Council approved an Archival Acquisition policy for the preservation of corporate records that have important historic or transparency value. Items for the corporate archives have been reviewed and catalogued based on the policy including acquisitions from the Burlington Public Library.

A new online FOI tracking system was implemented to improve our reporting capabilities and staff efficiency in responding to public requests.

Implemented a new online by-law management system for the public and staff to facilitate easy information retrieval.

Emerging Opportunities and Anticipated Risks

Emerging Opportunities	<p>Online forms and service requests will help decrease wait times for customer service requests to the City. New online services are being launched each year with support from Service Burlington.</p> <p>Increasing the number of services offered at Service Burlington through a Customer Relationship Management system to provide a one-stop, easy to access customer service centre; available online, by phone, mobile app, social media and more.</p> <p>Engaging customers using a standardized customer survey to gather baseline data for analysis and trend measurement will be vital to support positive changes for business owners. This will provide an understanding of what customers are looking for, where services need to be offered, and clarity of the different access options (e.g. online, email, in person). This supports our customer-centric service philosophy.</p> <p>Shift from paper to electronic records provides new avenues for information sharing between staff and the public.</p> <p>New engagement channels are being introduced rapidly and are desired by the community.</p>
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Anticipated Risks	<p>Errors with data entry are avoided or reduced through business processes that include customer review of marriage licenses.</p> <p>Risks associated with cash handling have been avoided or reduced through strict procedures and supervisory end-of-day balancing.</p> <p>Increased workload due to FOI and privacy investigations reduces staff resources available to effectively manage the Records portfolio and provide support across the organization for this work.</p> <p>Easy and quick access to the growing corporate information assets is not able to be provided within the current technology and records resources.</p>
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Service Objectives

Target Completion

Purchase a Customer Relationship Management system to allow Service Burlington to quickly and efficiently deal with most public inquiries at the first point of contact. Council and management will also be able to quickly analyze emerging trends on the quantity and nature of citizen concerns and use that information to make decisions about budgets and resources.	Dec 2017
Expand Service Burlington area into a full-service Customer Contact Centre providing walk-in, online and telephone service. By creating one service window, the majority of public inquires can be addressed at the first point of contact. This makes it faster and easier for residents and visitors to do business with the City.	Dec 2017

Implement a Routine Disclosure policy to expand the public's options for easier information access.	Mar 2017
Develop an Information Management strategy, in collaboration with other city departments, to improve the accessibility of information for public access and to support data-driven business decisions.	Dec 2017
Promote the city's archives to support the community's sense of history and place. Prepare for the 150 anniversary of Burlington as a community (2023).	Aug 2017
Implement a Privacy Impact Assessment process to enhance the protection of personal information held by the city, electronically or in paper.	Oct 2017

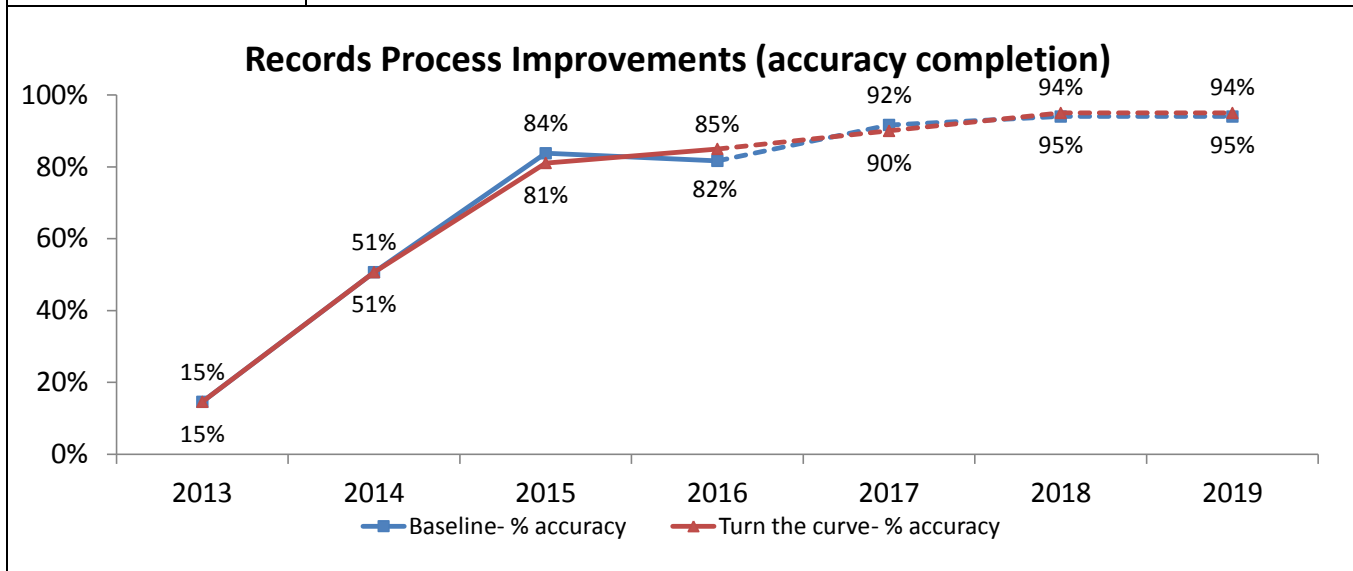
MEASURING SUCCESS

How much did we do?

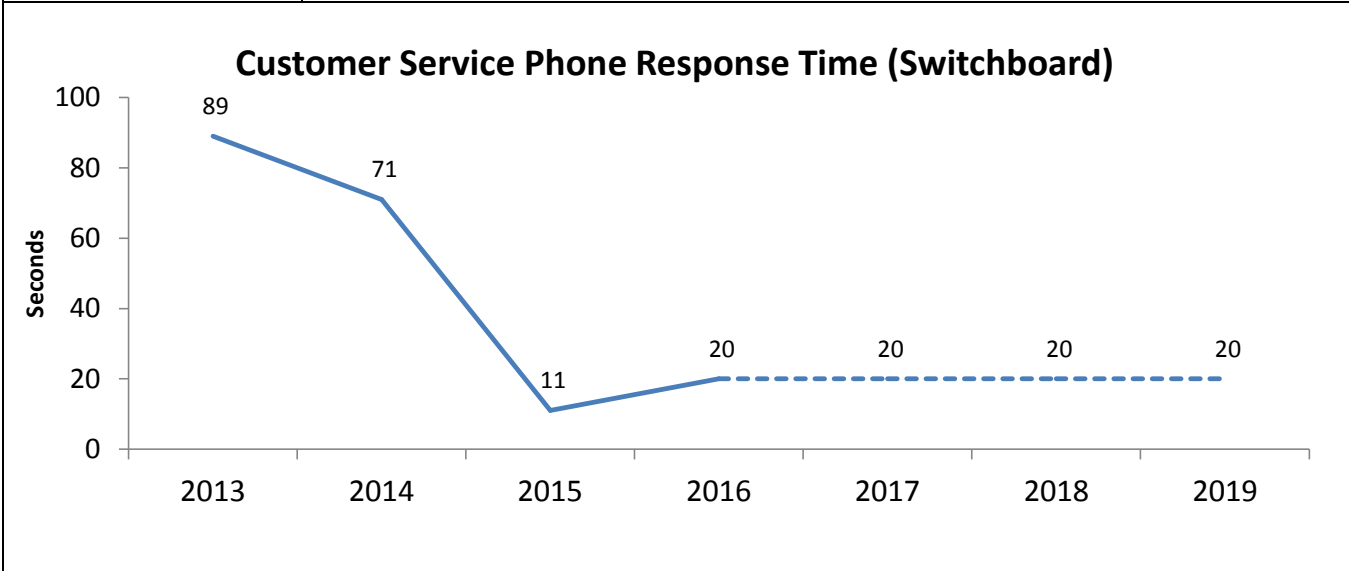
Performance Measurement	2012 Actual	2013 Actual	2014 Actual	2015 Actual	2016 Projection	2017 Forecast	2018 Forecast	2019 Forecast
Tax payments processed	3,613	3,696	3,178	3,522	3,100	3,000	3,000	3,000
Vital statistics (marriage, licences, death registration)	1,657	1,700	2,091	2,071	2,100	2,100	2,100	2,100
Commissioner of Oaths service	800	750	902	866	900	1,000	1,000	1,000
Freedom of Information requests	45	37	67	63	70	70	70	70
Phone calls through switchboard	N/A	55,043	41,873	49,968	54,000	57,000	57,000	57,000

How well did we do it?

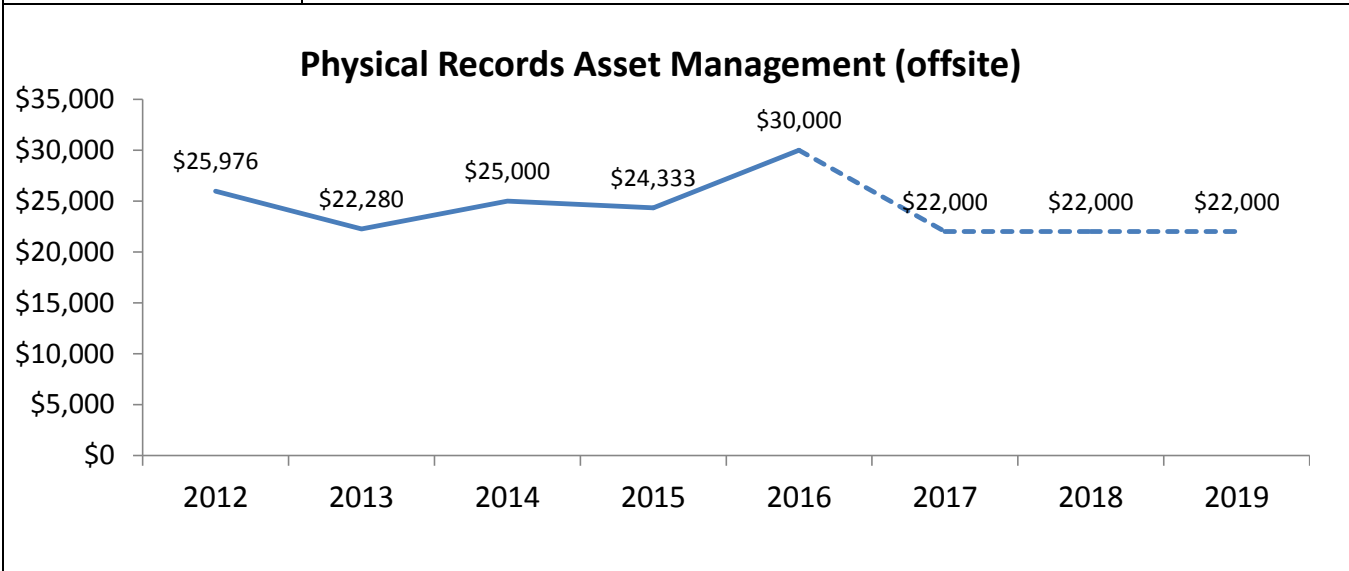
Performance Measurement	Records Process Improvements (accuracy completion)
Story behind the data	Training done from 2014 forward has decreased the number of errors on transmittal sheets and improved offsite storage administration time and accuracy. Further 2016 enhancements made to the transmittal sheets and on-going training has supported the continued improvements. This measurement has now achieved the turn the curve targets so a new measure is being developed in 2017 for the Records area.



Performance Measurement	Customer Service Phone Response Time (Switchboard)
Story behind the data	City Hall's reception desk have focused on reducing the call response time down to below 20 seconds to improve our customer service satisfaction. Working with the data staff have identified peak periods so that additional staff scheduling could be used to improve this measure.

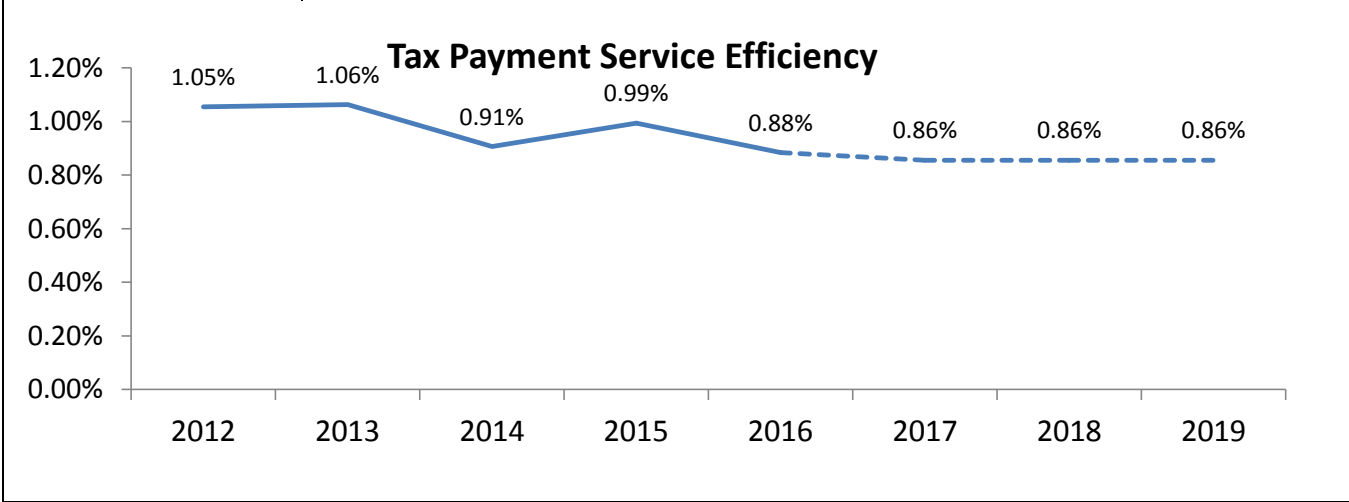


Performance Measurement	Physical Records Asset Management (offsite)
Story behind the data	In January 2015 council approved a new records retention by-law. The new retention times were applied at the end of 2015 and created a one-time increase of record destruction in 2016. This increase in destruction costs are offset with a decrease in the cost of storing these boxes annually. This is reflected in the decreased expense in future years. The revitalized records retention schedule ensures the records of business value are retained and office storage space is minimized.



Is anyone better off?

Performance Measurement	Tax Payment Service Efficiency
Story behind the data	Tax payments were brought under the Service Burlington Counter in 2012. A new cheque processing system used at the counter in 2013 resulted in a slight increase in the number of payments that year. These payments were always taken at the counter but the transaction count was not available until 2013.
Where do we want to go?	Service Burlington continues to work with Finance to promote online and preauthorized payment options to in-person customers. In doing so, it is expected residents will take advantage of the easier access alternative payment methods, decreasing the number of in-person payments. This measurement has achieved the target of less than 1% of tax payments being handled in-person. A new target is being developed for Service Burlington in 2017.



SERVICE RESOURCE SUMMARY

Service Description

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Service Owner Name

Deb Caughlin

	2015	2016		2017 Proposed				
	Actual	Budget	Year End Projections	Base Budget	% Change vs. 2016 Budget	Business Cases	Total Budget	% Change vs. 2016 Budget
Human Resources	\$ 566,934	\$ 705,930	\$ 672,730	\$ 727,878	3.1%	\$ -	\$ 727,878	3.1%
Operating/Minor Capital Equip.	\$ 43,224	\$ 36,000	\$ 36,000	\$ 37,440	4.0%	\$ -	\$ 37,440	4.0%
Purchased Services	\$ 26,389	\$ 21,900	\$ 31,900	\$ 21,900	0.0%	\$ -	\$ 21,900	0.0%
Corp. Expenditures/Provisions	\$ 2,463	\$ 1,000	\$ 1,000	\$ 1,000	0.0%	\$ -	\$ 1,000	0.0%
Internal Charges & Settlements	\$ -	\$ -	\$ -	\$ -	n/a	\$ -	\$ -	n/a
TOTAL EXPENDITURES	\$ 639,010	\$ 764,830	\$ 741,630	\$ 788,218	3.1%	\$ -	\$ 788,218	3.1%
Controllable Revenues	\$ (201,143)	\$ (202,390)	\$ (202,490)	\$ (209,190)	3.4%	\$ -	\$ (209,190)	3.4%
General Revenues & Recoveries	\$ (1,763)	\$ (1,050)	\$ -	\$ -	-100.0%	\$ -	\$ -	-100.0%
TOTAL REVENUES	\$ (202,906)	\$ (203,440)	\$ (202,490)	\$ (209,190)	2.8%	\$ -	\$ (209,190)	2.8%
NET OPERATING BUDGET	\$ 436,104	\$ 561,390	\$ 539,140	\$ 579,028	3.1%	\$ -	\$ 579,028	3.1%