

Service Business Plan



Service Name	Service Burlington	Service Type	Public
Service Owner Name	Andrea Holland	Budget Year	2019
Service Owner Title	Manager of Records and Information		

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, new customer relationship management tool (2019)</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 burial permits/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. Corporate records management, offsite storage, archives; training; policy and procedure.
Access and Privacy	Providing public access to corporate records and archives through formal FOI requests, routine disclosure open data. Corporate training; policy and procedure advice on privacy and access/disclosure of information.

Recent Continuous Improvement Initiatives

Implementation of the Customer Service Strategy has been initiated with the purchase and implementation of a Customer Relationship Management system. The Clerks department is set to go live Q1 2019, with additional departments later in the year. Customers will experience more resolution with the first point of contact and the city will be expanding Service Burlington to handle more customer enquiries and service requests. Customer enquires and requests will be tracked in the system, where staff can manage expectations and service levels.

Continued training in the records and privacy section has resulted in an increase in staff knowledge around privacy legislation and the custody and control of personal information.

Initiation of the Information Governance committee to create corporate policies and framework to increase awareness of the importance information management and using information as an asset.

Launch of the new online marriage application has been successful with the majority of applications completed online versus in person at the counter. This new online form has decreased the customers wait time for all marriage transactions.

Launch of the new online FOI form allows customers to create and pay for requests, eliminating the need to come to city hall to pay for the request.

A cash handling audit created synergies between departments and corporate adoption of procedures; decreasing operational risk.

Emerging Opportunities and Anticipated Risks

Emerging Opportunities	<p>Customer Relationship Management System:</p> <ul style="list-style-type: none">- the Steering Committee will be deciding on next steps with the system implementation and how services can be expanded across the city. <p>Implementing a customer service portal that is managed by the customer, containing profiles of requests and inquires, displaying request statuses.</p> <p>Shift from paper to electronic records provides new avenues for information sharing between staff and the public.</p>
Anticipated Risks	<p>Easy and quick access to the growing corporate information assets is not easily accessible within the current technology and records resources.</p>

Service Objectives	Target Completion
<p>Implement 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.</p>	<p>Mar 2019</p>
<p>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.</p>	<p>Jan 2020</p>
<p>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. A terms of reference has been completed and a corporate team has been formed to develop a corporate strategy.</p>	<p>May 2019</p>

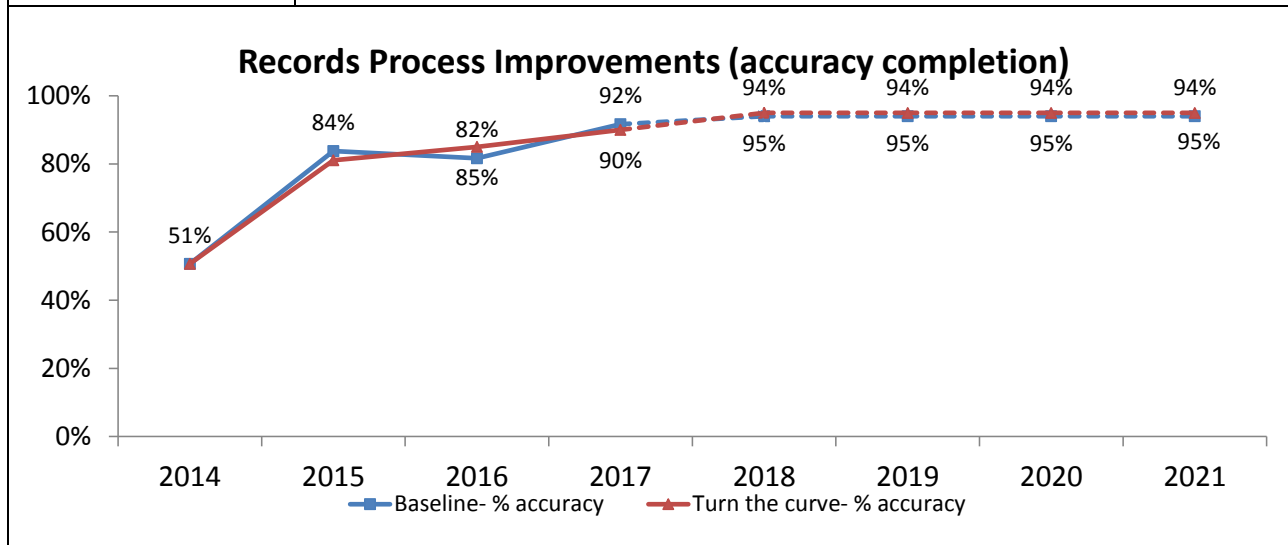
MEASURING SUCCESS

How much did we do?

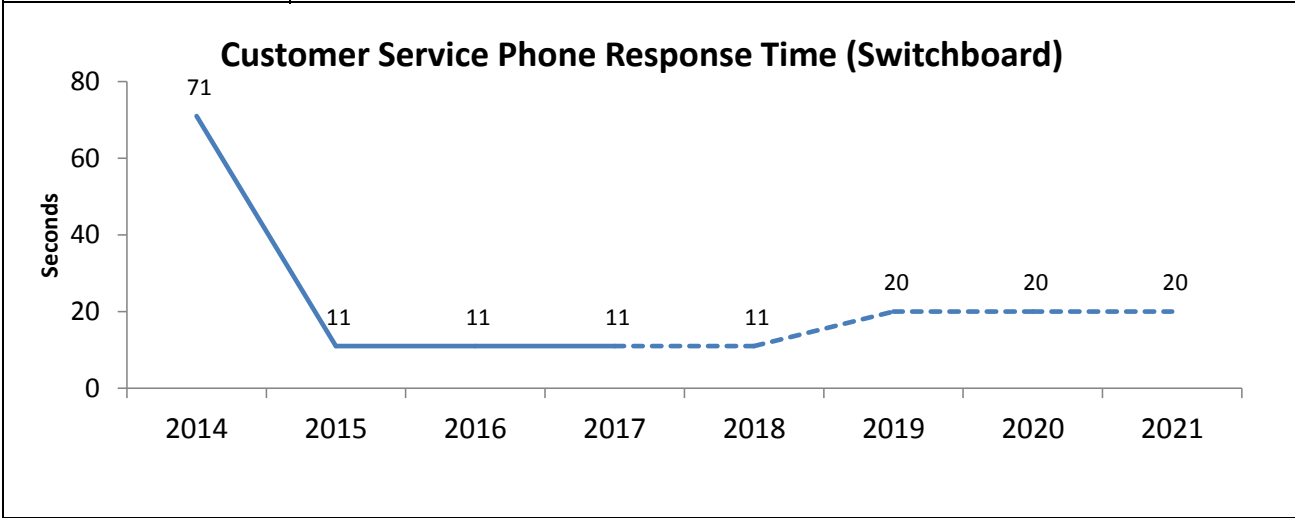
Performance Measurement	2014 Actual	2015 Actual	2016 Actual	2017 Actual	2018 Forecast	2019 Forecast	2020 Forecast	2021 Forecast
Tax payments processed	3,178	3,522	4,935	5,252	5,100	5,050	5,000	5,000
Vital statistics (marriage, licences, death registration)	2,091	2,071	2,120	2,100	2,100	2,100	2,100	2,100
Commissioner of Oaths service	902	866	995	1,100	1,000	1,000	1,000	1,000
Freedom of Information requests	67	63	70	95	80	70	70	70
Phone calls through switchboard	41,873	49,968	41,400	57,000	65,000	70,000	75,000	75,000

How well did we do it?

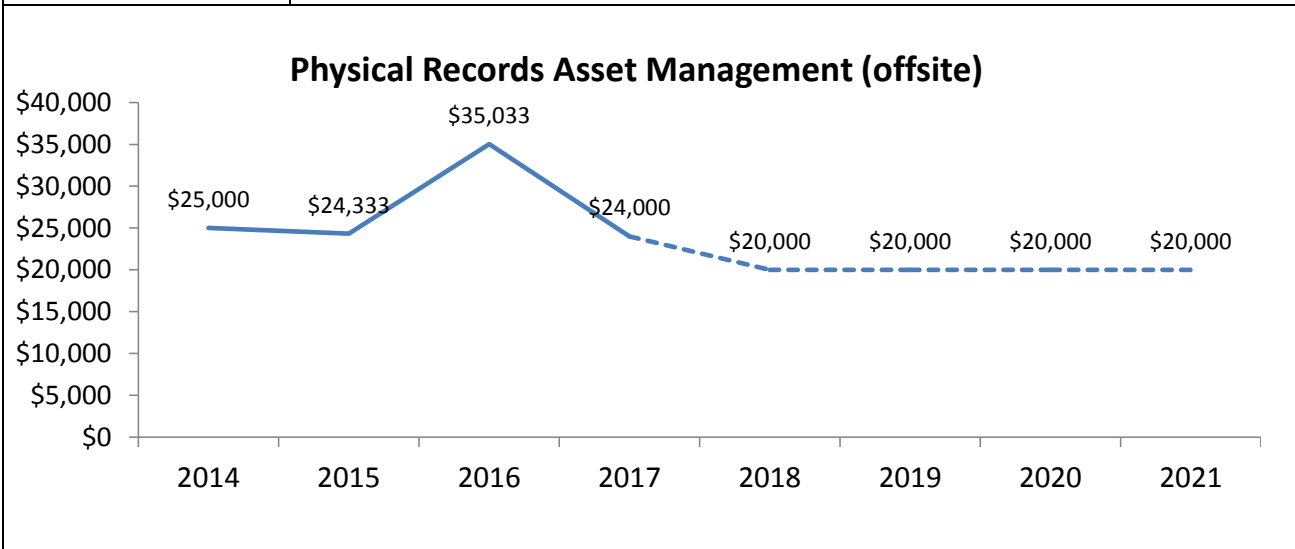
Performance Measurement	Records Process Improvements (accuracy completion)
Story behind the data	Training done from 2014 forward has decreased the number of errors on transmittal sheets and improved offsite storage administration time and accuracy. Further 2016 enhancements made to the transmittal sheets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



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. With the introduction of the CRM system, staff anticipate a little longer wait time as staff transition to a full functioning contact centre and answering calls, rather than transfer of all calls.

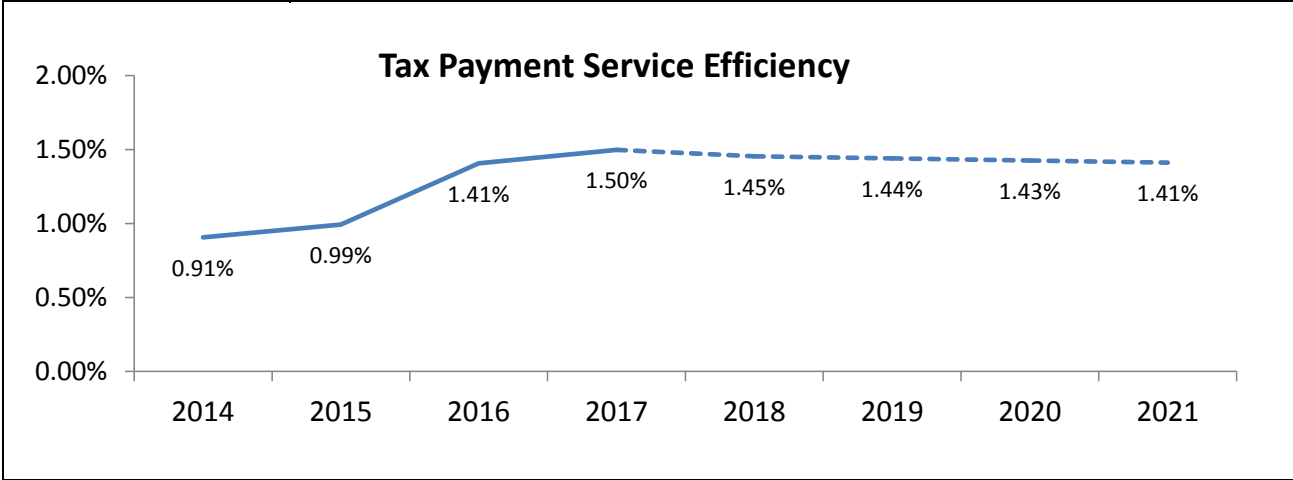


Performance Measurement	Physical Records Asset Management (offsite)
Story behind the data	In January 2015 council approved a new records retention by-law. The new retention times were applied at the end of 2015 and created a one-time increase of record destruction in 2016. This increase in destruction costs are offset with a decrease in the cost of storing these boxes annually. This is reflected in the decreased expense in future years. In 2017, the records area retrieved over 300 boxes without description for review by departments. A number of these have been sent for destruction, this should cause a slight increase in budget for 2017 but decrease storage costs for future years.



Is anyone better off?

Performance Measurement	Tax Payment Service Efficiency
Story behind the data	Tax payments in 2016 and 2017 rose due to the processing of all current dated cheques received at the Service Burlington counter. This has increased workload for Service Burlington staff but decreased Finance staff processing time. This was changed due to capacity at the Service Burlington counter and also to mitigate security risk of transporting cheques from one facility to another.
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 payment.



Performance Measurement	Customer Service Satisfaction
Story behind the data	In 2015 a standardized corporate Customer Service Survey is being finalized for use by all Business Owners to help them gauge more regularly what their customers' satisfaction is between the times that the community wide survey is done.
Where do we want to go?	With the implementation of the new Customer Relationship Management system staff will be able to accurately measure our service level response to customer enquiries and service requests. Staff will have access to customer connections and properly assess responses with access to the most up to date information that is stored in the system.

