

8. 2016 SERVICEOTTAWA PERFORMANCE MEASUREMENT

MESURE DU RENDEMENT DE SERVICEOTTAWA 2016

COMMITTEE RECOMMENDATION

That Council approve the Service Level Standards for phone and email service provided by ServiceOttawa, as described in this report.

RECOMMANDATION DU COMITÉ

Que le Conseil approuve les normes sur les niveaux de service téléphonique et de courriel de ServiceOttawa, comme il est décrit dans le présent rapport.

DOCUMENTATION/DOCUMENTATION

1. Director's report, ServiceOttawa, dated 22 September 2017 (ACS2017-SIP-SO-0006)

Rapport de la Directrice, ServiceOttawa, daté le 22 septembre 2017 (ACS2017-SIP-SO-0006)

2. Extract of draft Minutes, Finance and Economic Development Committee, 3 October 2017

Extrait de l'ébauche du procès-verbal, Comité des finances et du développement économique, le 3 octobre 2017

**Report to
Rapport au:**

**Finance and Economic Development Committee
Comité des finances et du développement économique
3 October 2017 / 3 octobre 2017**

**and Council
et au Conseil
11 October 2017 / 11 octobre 2017**

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Ward: CITY WIDE / À L'ÉCHELLE DE LA VILLE File Number: ACS2017-SIP-SO-0006

SUBJECT: 2016 ServiceOttawa Performance Measurement

OBJET: Mesure du rendement de ServiceOttawa 2016

REPORT RECOMMENDATION

That Finance and Economic Development Committee recommend Council approve the Service Level Standards for phone and email service provided by ServiceOttawa, as described in this report.

RECOMMANDATION DU RAPPORT

Que le Comité des finances et du développement économique recommande au Conseil d'approuver les normes sur les niveaux de service téléphonique et de courriel de ServiceOttawa, comme il est décrit dans le présent rapport.

EXECUTIVE SUMMARY

ServiceOttawa, created in 2011, is the first stop for City information and services. Investments made by Council in ServiceOttawa have facilitated initiatives to improve residents' and business' experience when accessing City services through ServiceOttawa.

The purpose of this report is to inform Council of recent performance and planned enhancement projects, as well as address audit commitments from the Council approved 2015 Audit of 3-1-1 Contact Centre and the 2012 Audit of Client Service Centres with respect to performance information and service level standards.

Recent performance information indicates that ServiceOttawa is trending well on all channels with high rates of satisfaction and quality service delivery. In addition, ServiceOttawa is implementing improvement projects such as a new Interactive Voice Recognition and a Courtesy Callback system at 3-1-1, as well as improvements to some of the most popular pages on ottawa.ca to further enhance customer satisfaction. Options for service level targets are provided in the following report for Council's consideration. As directed by Council, ServiceOttawa is seeking endorsement of the service level at 3-1-1 and an improved target for email as set out in the following report – both of which require no additional investment.

RÉSUMÉ

ServiceOttawa, créé en 2011, constitue le meilleur endroit où trouver des services et des renseignements municipaux. Le soutien financier du Conseil dans le cadre du programme ServiceOttawa a permis d'appuyer des initiatives visant à améliorer l'expérience des résidents et des entreprises qui obtiennent des services municipaux au moyen de ServiceOttawa.

Le présent rapport vise à informer le Conseil du rendement récent et des projets d'amélioration prévus, ainsi que traiter des engagements en matière de vérification présentés dans la vérification de 2015 du Centre d'appels 3-1-1 approuvée par le

Conseil et la vérification de 2012 des Centres du service à la clientèle en ce qui concerne les données sur le rendement et les normes sur les niveaux de service.

Selon les dernières données sur le rendement, ServiceOttawa réussit bien sur toutes les voies, affichant des taux élevés de satisfaction et de prestation de services de qualité. De plus, ServiceOttawa mène des projets d'amélioration, comme un nouveau logiciel interactif de reconnaissance de la voix et un système de rappel de courtoisie au Centre d'appels 3-1-1, de même que des améliorations à quelques-unes des pages les plus populaires du site Web ottawa.ca afin d'accroître davantage le degré de satisfaction des clients. Les possibilités de cibles en matière de niveau de service sont soumises à l'examen du Conseil. Selon les directives du Conseil, ServiceOttawa demande de faire approuver le niveau de service au Centre d'appels 3-1-1 et de fixer un objectif rehaussé pour les courriels comme l'indique le rapport qui suit – ni l'un ni l'autre n'exigeant un soutien financier supplémentaire.

BACKGROUND

Understanding that ServiceOttawa is often the first stop for City information and services for residents, businesses and visitors, it is important that Council is informed of performance and improvement plans in order to provide direction or approval as appropriate. This has been reiterated by the Auditor General through the Council approved report ACS2013–OAG BVG-0001 which discussed the findings of the 2012 Audit of Client Service Centres and report ACS2015-OAG-BVG-0005 which outlined the recommendations in the Audit of 3-1-1 Contact Centre where the Auditor General specifically recommended that ServiceOttawa:

- Measure performance to adequately reflect performance against strategic priorities and operational objectives to provide adequate performance information to Council and manage more effectively (#5, Audit of Client Service Centres, 2012)
- Conduct a detailed financial analysis of various service level standards for calls and for emails and seek formal approval (#4, Audit of 3-1-1 Contact Centre, 2015)
- Report on all wait times and abandoned calls and disclose how service levels are calculated (#5, Audit of 3-1-1 Contact Centre, 2015)
- Report on email service levels (#9, Audit of 3-1-1 Contact Centre, 2015)

ServiceOttawa was created in 2011 and delivers service through three main channels - 3-1-1 Call Centre, Counter Services which includes Client Service Centres and Provincial Offences offices, and through the City's main web site ottawa.ca.

ServiceOttawa works closely with internal City departments and various levels of government to ensure that the right information and services are available to residents, businesses and visitors when they require it.

3-1-1

The 3-1-1 Contact Centre has 28.4 bilingual front line FTEs (combination of full time, part time and casual employees) who responded to over 450,000 calls and over 4000 emails from residents and visitors to the City of Ottawa in 2016. These agents provide information and create service requests for various City departments in over 170 languages in real time, often conducting conference calls with employees in other departments to ensure that callers are speaking with experts who can answer their questions and provide appropriate direction. As well, 3-1-1 agents dispatch on-call departmental resources in real time to deal with urgent public safety issues such as water main breaks, malfunctioning traffic lights and required road closures. In addition to responding to calls, 3-1-1 agents respond to emails from residents and redirect service request among departments. They also provide burial permits in the evenings and on weekends. Further, agents manage and update the Interactive Voice Response (IVR), the automated voice messaging system that provides callers with messaging, updated with current information on emerging topics.

Counter Services

Counter services are comprised of seven Client Services Centres (CSC) – four urban centres which are open five days per week and three rural centres which are open one day per week – as well as three urban Provincial Offence Act (POA) offices.

Within City Hall, ServiceOttawa staff are responsible for staffing the information booth in the main hall as well as the greeter desk in the Client Service Centre area on behalf of the combined Government Service Centre housing ServiceOttawa, Service Ontario and

Service Canada. This service is delivered on behalf of all three levels of government under a Memorandum of Understanding.¹

The Client Service Centres provide a wide range of services from marrying couples and commissioning affidavits, to selling Presto cards and accepting property tax and water bill payments. The Provincial Offences Act offices take fine payments, process trial requests as well as support the court administration.

In 2016, the Counter Services completed over 120,000 different transactions amounting to nearly \$180 million. This was accomplished with a complement of 56.5 front line FTE.

Web Services

The Web Service Team is made up of 10 FTE who are responsible for many aspects of the City of Ottawa's web presence. The team directly manages ottawa.ca by supporting technical changes with the IT team, conducting regular usability testing on ottawa.ca and implementing proposed improvements. They directly support departments in selecting and building solutions with the customer experience in mind and designing content. This is done through training, accessibility advice, quality assurance input and usability design expertise. This team responds directly to web feedback, manages a continuous improvement program and creates interactive forms online. In 2016, ottawa.ca had over 10 million sessions making it the most popular channel for information and services. In 2016, 19 per cent of all service requests were completed online and 2017 is seeing a trend of 23 per cent supporting the digital channel as a growing channel of choice.

In December 2016, the Web Services team with Information Technology staff implemented a critical upgrade of ottawa.ca to improve the user experience. This included updates to the website platform, creating a site that is mobile friendly and easier to use, with improved search features and accessibility. Usability testing was carried out in January 2017 which formed the basis of the Web Services team's 2017 work plan.

¹ Memorandum of Understanding between the Provincial Government of Ontario as a division of the Ministry of Government Services, Service Ontario, the City of Ottawa and the Government of Canada as represented by the Minister of Employment and Social Development Canada

Since 2011, ServiceOttawa has implemented and continues to improve the following tools in the operations to enhance the delivery of service:

- A Client Relationship Management (CRM) tool that allows service requests to be electronically sent to backend departments expediting service.
- a Knowledge Base tool that is a repository of information on frequently asked questions which allows agents to have accurate bilingual information on over 1700 different topics
- a Workforce Management tool which supports 3-1-1 to use historical call volumes to predict future calls, and builds a schedule with existing resources to best meet service level expectations
- a quality assurance monitoring tool which records incoming calls that can be reviewed for accuracy and overall client service
- a robust phone system which provides comprehensive data allowing management to better plan and develop a flexible operating model to best achieve service level expectations

DISCUSSION

The following report provides performance data on all three channels, options for service levels for phone and email responses with a corresponding financial impact for consideration. Furthermore, this report provides an update on initiatives underway to further improve the customer experience within existing resources.

2016 Performance Overview

ServiceOttawa has developed a set of key performance indicators that are common across external service channels. These performance indicators measure **Quality**, **Client Satisfaction**, and the achievement of **Service Level**.

Table 1: ServiceOttawa 2016 Performance

Channel	Quality Score	Client Satisfaction	Service Level
Web	Not available ²	73%	Not applicable
Counters³	91%	84%	Not available ⁴
311	79%	84%	78%
Email	85%	Not available ⁵	89%

Note: Historical Performance data is provided in Document 1 for reference.

Quality of Service Delivery

With Council's investment, ServiceOttawa has implemented a robust quality assurance program staffed by knowledgeable analysts who monitor interactions between agents and clients either in person (at the Counters), randomly selected recorded calls (at 3-1-1) or a review of random emails (at 3-1-1). In each channel, interactions are assessed for compliance with internal policies, such as an appropriate professional bilingual greeting and probing to understand clients' needs. As well, compliance with more technical requirements such as adhering to policy and legislative requirements, delivering appropriate resolution, accurate documentation and client service skills is reviewed. This program is managed outside of the service delivery areas to ensure a bias-free program.

In 2016, the Counter Services achieved a quality rating of 91 per cent and is tracking well to achieve a similar score in 2017.

3-1-1 achieved a quality rating of 85 per cent on emails and 79 per cent on the phone. Management identified the need for improvement for 3-1-1 phone quality scores and created team lead position through the realignment in October 2016. One of the key responsibilities of the team lead is to coach staff to deliver a better quality customer

² A Continuous Improvement program is being launched in 2017. Data will be available in 2018.

³ 2016 performance metrics exclude POA as this service joined ServiceOttawa at the end of 2016

⁴ Service Level for Counters is not available as there is no queueing system available to track this information.

⁵ Program launched in Q4 2016, sample size is too small to report for 2016.

experience using the quality assurance results. To date in 2017, 3-1-1 phone quality scores are showing an improvement, currently trending at 82 per cent.

ServiceOttawa is implementing a comparable program for the website in 2017 to support departments in determining areas for improvement on their web pages.

While quality is a good indicator of service performance, it is an assessment against a service delivery expectation defined by staff. It is important to understand how the client is experiencing the service, which is measured through a Customer Satisfaction program.

Customer Satisfaction

The voice of the client is critical to understanding where to make service improvements. ServiceOttawa has a robust client satisfaction program with a point-of-service survey that occurs on each channel. This is accomplished by offering surveys to every second caller at 3-1-1, to every 15th visitor to ottawa.ca, to every email recipient and to Client Service Centre visitors⁶. Each survey asks questions related to drivers of satisfaction such as timeliness, knowledge of staff, courtesy and issue resolution as appropriate based on the channel. In 2016 both the Counters and the Call centre had satisfaction scores of 84 per cent, ottawa.ca had a score of 73 per cent while email responses provided too low a sample size to provide reliable information.

As indicated one of the key drivers of satisfaction is the timeliness of service delivery. For 3-1-1 this is defined as a service level for both phone calls and emails which sets the expectation with clients for when they can expect to have their call answered or receive a response to their email.

Service Level

In the 2015 Audit of the 3-1-1 Contact Centre the Auditor General recommended that ServiceOttawa department:

- Report to Council and Senior Management on all wait times and abandoned calls and disclose how service levels are calculated in the Semi-Annual Report to Council

⁶ Surveys have been done in person; currently a pilot is underway at the Laurier CSC where a digital survey is available via a tablet.

- Conduct a detailed financial analysis of various service level standards for calls and for emails and seek formal approval from Senior Management and Council

3-1-1 Service Level

A comprehensive understanding of the services provided through 3-1-1, and performance against targets is important context to inform decisions related to service provision. Since its inception in 2005, the service level target at 3-1-1 has been to ensure that 80 per cent of callers do not wait longer than 120 seconds for service.

Service Level Calculation and Financial Analysis

According to the International Customer Management Institute (ICMI), a global leader in call centres, there are four standard calculations⁷ used to articulate the service level of a call center. The formula used at 3-1-1 in Ottawa is described as “*the preferred approach because the calculation includes all of the traffic received by the [system]. This calculation provides a complete picture of what is happening since it takes all calls into consideration*”.⁸

The calculation definition and the corresponding service level used in Ottawa for 2016 was:

$$\frac{\text{(total calls answered and abandoned under 120 seconds)}}{\text{(total calls answered + total calls abandoned)}} = 78\%$$

In 2016, 78% of callers did not wait longer than two minutes for service, with an average wait time of 97 seconds

A peer review of Canadian municipalities found that there was no single method used for calculating service level; however, Edmonton, Calgary and Toronto use the same methodology as Ottawa. This similarity provides for greater consistency in comparators. Since this calculation has been employed for years, it allows for comparison of historical

⁷ 1. (Total calls answered and abandoned within threshold) / (Total calls answered + Total calls abandoned)

2. (Total calls answered within threshold) / (Total calls answered)

3. (Total calls answered within threshold) / (Total calls answered + Total calls abandoned)

4. (Total calls answered within threshold) / (Total calls answered + Total calls abandoned after threshold)

⁸ The Essential Reference for Contact Center, Help Desk and Customer Care Professionals, Brad Cleveland, 2003

3-1-1 performance. Any further communications of this service will include the calculation to ensure transparency.

This calculation recognizes that inherent in any call centre services is the occurrence of abandoned calls. Some callers will abandon the call within seconds of reaching the queue for a variety of reasons. Based on a sample, in 2016 it was found that nearly 10 per cent of all abandoned calls occur during the IVR messaging, suggesting clients may have received the information they needed, and almost half of the total abandoned calls occurred within the first 30 seconds. Staff believe that tracking abandoned calls within the service level calculations allows monitoring and provides a holistic view of service. As a result, the calculation of service level includes data related to abandoned calls.

ServiceOttawa uses its approved budget and FTE resources to build a schedule to achieve its target of having callers wait no longer than two minutes, 80 per cent of the time, with many calls being answered below the two-minute threshold. With this target and calculation methodology in mind, 3-1-1 has developed a schedule using a call forecasting tool (WFM) to meet this service expectation within its current budget and FTE complement of 28.4 FTEs. ServiceOttawa supplements this schedule with cross functional agents when required from the Client Service Centres who are trained to take some types of phone calls – as seen during the flooding earlier this year. To further increase flexibility and support the delivery of service during periods of higher-than-predicted call volumes, a pool of casual employees and allocation of an overtime budget is also utilized. As a result, 3-1-1 has experienced steady improvement in service level over the past four years⁹.

Using the method of calculation described above, ServiceOttawa reviewed alternate 3-1-1 service levels and associated financial impacts per the Auditor General's recommendation. The analysis for the service level options listed below illustrates the additional FTEs required and the associated investment required to achieve various service standards, and provides information on the anticipated corresponding rates of abandoned calls.

Service Level Analysis - Table 2¹⁰:

⁹ Service Level scores: 2013 – 70%, 2014 – 76%, 2015 – 76%, 2016 – 78%

¹⁰ Based on the cost of an agent's average 2016 salary, fully loaded - including all benefits

3-1-1 Service Level Analysis			
Service Level	Abandonment rate as a percentage of all calls received ¹¹	Additional FTEs required	Additional Annual Net Costs
30 sec	5.4	7.0	\$612K
45 sec	6.4	6.4	\$560K
60 sec	6.9	5.9	\$516K
75 sec	7.4	5.3	\$464K
90 sec	7.8	5.0	\$437K
105 sec	8.1	4.7	\$411K

While abandon rates can be impacted by improving the service level as illustrated in Table 2, there may be opportunities to impact this rate of abandon without the addition of staff such as by offering a shorter and more informative interactive voice response system (IVR) or a virtual queueing system (Courtesy Call Back) – both of which ServiceOttawa is exploring for implementation by the end of 2017.

Given the declining call volumes to 3-1-1¹², the current level of satisfaction with the service (84 per cent), the improved abandon rate¹³ and the ongoing enhancements planned for 3-1-1, **staff recommend that Council approve the current service level standard of callers waiting no longer than two minutes to have their calls answered, 80 per cent of the time.**

Further to the recommendation that staff cost out various service levels for phone calls, the Auditor General also recommended that staff:

- Conduct a detailed financial analysis of various service level standards for calls and for **emails**, and seek formal approval

¹¹ Values are developed through review of two week-long samples

¹² Volume of answered calls: 2013 – 532 306, 2014 – 499 619, 2015 – 501 516, 2016 – 455 806

¹³ Abandon Rate: 2013 – 19%, 2014 – 16%, 2015 – 14%, 2016 – 13%

Email Service Level

Incoming emails to 311@ottawa.ca are responded to by 3-1-1 agents. While representing a small volume of interactions – less than one per cent of all interactions that are handled through 3-1-1 - public email remains an avenue for a small portion of clients. This channel is managed by 3-1-1 staff during lower call volume periods, predominantly during the overnight shift or by staff working at the information booth at City Hall.

The historical target for the email channel has been to respond to 80 per cent of emails within five business days following an immediate automated acknowledgement.

With a flexible workforce provided with enhanced training, 81 per cent of all emails received a response within four business days in 2016, with the average response time of less than three days.

The following analysis for email is provided, recognizing that a predictive tool to forecast email volumes and the rate at which emails are received is not available.

Resources required to respond to 80 per cent of emails¹⁴

Service Level	Additional FTEs required	Additional Annual Net Costs
4 days	0	\$0K
3 days	.25	absorbed within existing budget
2 days	.5	absorbed within existing budget
1 day	.75	\$66K

An environmental scan of several Canadian municipalities found that the email channel service level target ranges between 24 hours to five business days. Three of the municipalities targeted 48 hours or two business days, and one municipality has dispensed with their email channel in favour of online self-serve options.

¹⁴ Estimate based on staff being able to respond to 81 per cent emails within 4 business days in 2016. Reducing the response time required by one day represents a 25 per cent increase in service expectation requiring a corresponding investment in staff resources. Costing is based on mid range fully loaded cost for a 3-1-1 agent. Overnight staff is used as the baseline resource to estimate the required resources.

Since over 30 per cent of the emails received by ServiceOttawa could have been performed online, efforts will continue to promote the mobile-friendly online channels through which residents can find information and report requests for service directly to the responsible department. Further, an additional 14 staff have received training to respond to emails and expectations have been set for staff working on this channel

ServiceOttawa wishes to provide the highest quality of service to users through all of its channels. ***Staff recommend that Council approve an email service standard of responding to emails within 2 business days, 80 per cent of the time.*** This is consistent with other municipalities and staff believe this can be achieved with existing resources, given the anticipated decline in reliance on the email channel, additional trained staff and ServiceOttawa's focus on enhancing information and services on ottawa.ca.

Operational Model

ServiceOttawa manages the delivery of front line services with the existing complement of staff using a robust set of real time data. The Call centre is equipped with wall boards showing current service level, number of calls waiting, number of agents available for calls etc. This information is used in real time decision making such as employing other staff within the department who have been trained to take phone calls during periods of unexpected high calls volume. Furthermore, this real time data is translated to monthly agent-specific data used for coaching staff to address areas of improvement.

Next Steps

ServiceOttawa continues to focus on improving the client experience through a number of projects currently underway and targeted for completion by the end of 2017:

- Interactive Voice Recognition (IVR) project to streamline and shorten the messages at 3-1-1 providing clear information and reducing caller frustration
- Virtual Queuing Pilot will offer a courtesy call back to residents who do not wish to wait on the phone but would rather be called back when the agent is available
- Improvements to the most visited pages on ottawa.ca including updates to usability and content for the garbage collection calendar, hazardous waste disposal, parking information, recreation facilities and improving MYSO

- To further support data-based decision making, plans are underway to purchase a data visualization tool to help management synthesize large quantities of data

Conclusion

ServiceOttawa is often residents' and visitors' first point of contact with the City of Ottawa. As such, it is important that ServiceOttawa focus on the customer experience and continually adjust services to meet expectations.

Data shows high rates of satisfaction with 3-1-1 service and the corresponding quality scores. Coupled with the current initiatives underway to improve the customer experience - shortening the IVR and piloting Call Back initiatives - ServiceOttawa anticipates improved satisfaction with its services. Based on this information, staff recommends that Council endorse the current service level target for 3-1-1 to have callers wait no longer than two minutes to have their call answered, 80 per cent of the time.

Furthermore, with ServiceOttawa's continued work with departments to improve the website, the number of online service requests is continuing to increase in 2017. In conjunction with the focus of the web services team to improve usability and information on the website, there is an anticipated further reduction in preference for the email channel. As such, ServiceOttawa recommend Council endorse an email service level of clients receiving a response to their email within two business days, 80 per cent of the time. ServiceOttawa believes this standard can be achieved using their cross functional workforce with no additional investment.

In alignment with previous Council direction, ServiceOttawa will continue to focus on enhancing digital options and information for residents and provide high quality services meeting the needs of residents, visitors and businesses.

RURAL IMPLICATIONS

This report is City-wide and has no specific rural implications.

CONSULTATION

Internal report only.

COMMENTS BY THE WARD COUNCILLOR(S)

This report is City wide.

ADVISORY COMMITTEE(S) COMMENTS

Not applicable.

LEGAL IMPLICATIONS

There are no legal impediments to implementing the recommendations in the report.

RISK MANAGEMENT IMPLICATIONS

There are no risk implications associated with this report.

FINANCIAL IMPLICATIONS

There are no financial implications resulting from the recommendations in this report

ACCESSIBILITY IMPACTS

ServiceOttawa supports the City's efforts to meet the Provincially mandated accessibility requirements under the *Integrated Accessibility Standards Regulation (IASR)* of the *Accessibility for Ontarians with Disabilities Act (AODA) 2005* as outlined in the City's 2016-2020 Multi-Year Accessibility Plan. ServiceOttawa strives to ensure service to residents is inclusive and without barriers through WCAG compliant ottawa.ca interactions, at a counter or over the phone/TTY, or by email. ServiceOttawa staff provide training on accessibility web compliance through corporate-wide training on accessibility validation tools as well as the provision of the Creating Accessible Word Documents course. ServiceOttawa ensures that its own staff are trained on Accessible Customer Service in addition to other legislated AODA training

TERM OF COUNCIL PRIORITIES

Recommendations in this report are in alignment with the 2014-2018 Term of Council Priorities of Service Excellence and Financial Sustainability.

SUPPORTING DOCUMENTATION

1. Document 1, Historical Performance Metrics. (Held on file with the City Clerk)

DISPOSITION

ServiceOttawa staff will implement recommendations as outlined in the report.