Constituent Relationship Management Project

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City of Columbia

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Problem Statement

In 2010, the City of Columbia contracted with GovQA to deploy a service request web portal to support the 311 system related to non-emergency municipal services. The web portal is a system for reporting and tracking service requests. The constituent can create a user account or use the system anonymously. When a request is received from a constituent, it is automatically routed to the appropriate department for resolution. This system was enhanced in 2018 to include an application for Android and iOS mobile devices. Since 2018, more than 20,000 constituents have registered an account through the portal and/or the application. We received 5,539 requests between 2018 and 2023. This is good data to have. However, the effort to track communications with constituents and responses between departments is lacking.

For example, a constituent can submit a service request to the Customer Services Department by telephone or through the web portal and app. The representative forwards the request to the appropriate department and proceeds to close out the service request on their end without knowing the next steps towards a resolution. This is a problem because the system sends an email to the constituent indicating that the work order has been closed. However, in most cases the work hasn't even begun.

Without accurate or timely responses, the constituent becomes frustrated and calls City Hall to report the matter. Points of contact at City Hall include the legislative office, city manager's office, constituent services, governmental affairs, and the front desk receptionist. The responses vary based on the office and the individual receiving the call. Oftentimes, there is no fact checking or verification, but concerns are escalated to the department head or an assistant city manager. Even in this scenario, the constituent may or may not receive a direct response but the employee from City Hall assumes that the matter is resolved.

Another example may be that an elected official receives a request and it is handed off to executive management. The matter is escalated, but the elected official doesn't receive an update on the resolution. This impedes communication between elected officials and their constituents. The elected official may be viewed as unresponsive. When asked about his thoughts on the current service request system, Councilman Edward H. McDowell, Jr. said "We have a lot of broken promises in the system now due to unresponsiveness. We have to fix this." Because of our track record, City staff is often viewed as being unresponsive, unproductive and incapable. This may also lead to elected officials seeking to outsource services to a third party.

The lack of communication in the above examples can result in diminished constituent satisfaction and voter confidence; duplicate requests for assistance; increased response times; and delayed resolutions. All of these factors have a negative impact on quality of life. On February 17, 2022, Mayor Daniel J. Rickenmann unveiled a plan to improve responsiveness to constituents. At that time, the City had 600 vacancies and a severe backlog in water repairs, yard waste pickup and other service delays. This plan sought to improve responsiveness from first contact to final resolution and it did, in some ways.

On April 28, 2022, the Columbia City Council adopted seven strategic outcomes. The goal of this project aligns with the desired outcome for organizational effectiveness: *Columbia recognizes its mission is to serve the people who live and work in the City. The City invests in its people, technology, and training to achieve world class constituent service in order to ensure every interaction with the City results in a positive experience.* The project goal also aligns with the strategic outcome for communications: *As a result of increased communication and outreach, Columbia is a proud city that is diverse, resilient, and inclusive. We embrace innovation, new*

ideas, and collaboration with our partners and community. Our community is engaged, empowered, and informed, thus giving us a strong sense of purpose and belonging.

In order to provide world class constituent services, we must review our current processes and identify solutions that will improve internal communications and constituent relationship management.

Data Collection

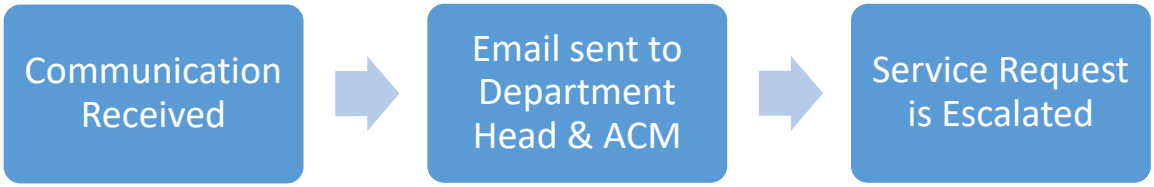
The collection of data allows us to assess the efficiency of our internal processes and services in hopes of developing solutions to address any deficiencies. I will use this data to demonstrate the volume of information and service requests received, the departments that should be actively engaged in assisting constituents, and the departments that should be a part of the communications loop with the goal of improving the constituent experience and employee response times.

To better understand the nature of requests, I reviewed data for requests received between 2018 and 2023 and data for requests received over the last 365 days. I also reviewed data on the average time it is taking departments to close service requests.

The current methods of intake include the service request web portal and application, telephone calls, text messages and emails from constituents. After speaking with several of my colleagues at City Hall, there were two major methods of communication used to address services requests: phone calls and emails. When asked to whom phone calls and emails were directed, the following responses were based upon the constituent's immediate need and the office involved:

- Sending an email to a group to include the department's contact and/or backup contacts and the department head.
- Calling the person who I know will respond quickly.

- When requests should be escalated, sending an email directly to the department head, assistant city manager and sometimes including the city manager and/or an elected official.



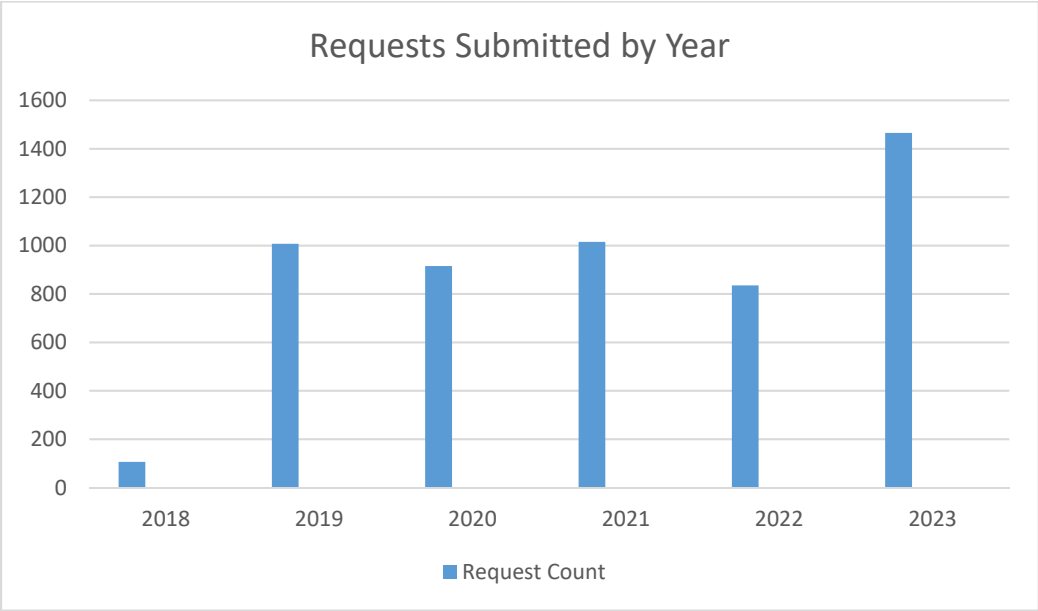
The special projects manager for utilities and engineering maintains a log to track the requests that are escalated to the assistant city manager (ACM) for Columbia Water. She estimates that 11 requests were escalated from City Hall to her office during January 1, 2024 to March 1, 2024. This does not account for all service requests that are received from City Hall and escalated through other departments. This workflow doesn't close the feedback loop.

Meetings have been held with various stakeholders to discuss the current workflow within their respective areas. At City Hall, I observed that everyone was managing his/her service requests to the best of their ability. Due to the number of communications, they thought they were the only ones receiving the service requests for City Hall. In an informal interview, the office manager for the city manager described her interactions with other departments. She said "It would be great to have a system that allows us to follow-up on requests and to hold our colleagues accountable."

We define constituents as residents within the jurisdiction of city limits and people who utilize the city's water, sewer, roads, parks, public safety and related services and amenities. The constituent data will help us to better understand their needs, expectations, and experiences.

Data Analysis

Since 2018, we received over 5,300 service requests via our automated service request system. This does not include many of the requests that were received through points of contact outside of the service request system.



The Five Whys

Why aren't all service requests entered into the service request system?

Because not all employees are aware of the process.

Why aren't all employees aware of the process?

Because there is insufficient training and awareness.

Why is there insufficient training and communication about the system?

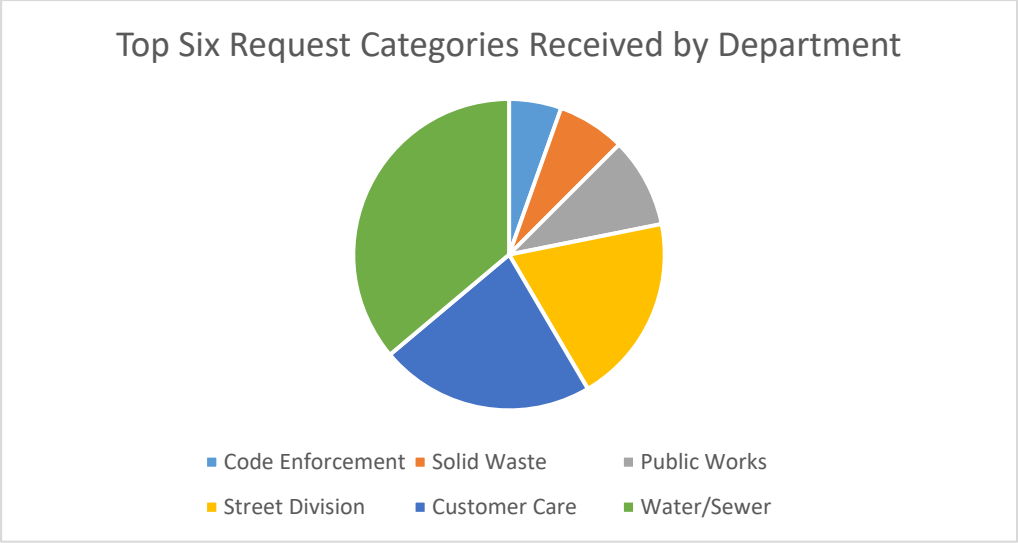
It is not included in the onboarding process.

Why is the service request system training not part of onboarding?

The organization hasn't prioritized training for the service request system.

Why hasn't the organization prioritized training?

There are competing priorities.



- The water and sewer maintenance divisions received 1,627 requests, which is 29%.
- The customer services department received 1,006 requests, which is 18%.
- The street division received 888 requests, which is 16%.
- The public works department received 421 requests, which is 8%.
- The solid waste department received 318 requests, which is 6%.
- The code enforcement division received 245 requests, which is 4%.

In 2024, we received 404 requests with 183 of those requests being related to water maintenance issues. To date, 303 or 73.37% of the requests remain open. The bulk of the open requests are related to the water maintenance division for a total of 157 requests.

The Five Whys

Why are over half of this year's constituent requests still open?

The requests remain open because no resolution has been reported.

Why hasn't a resolution been reported?

A resolution has not been reported because we have not heard back from the responsible department.

Why haven't you heard back from the responsible department?

When most departments receive a request, a work order is then created in CityWorks.

Why are new work orders created in CityWorks?

Work orders are created in CityWorks because it is the city's asset management system that is used to plan, manage and optimize maintenance.

Why don't constituents receive a response to their requests from CityWorks?

CityWorks is not integrated with the service request system.

Through this process, I initially made various assumptions about the unclosed work orders. I assumed that service requests for certain departments were not being managed at all. However, I learned that a constituent's service request may trigger the need for a work order to be created in another system called City Works.

An average of 790 work orders are created within CityWorks by Columbia Water personnel each month. Columbia Water includes all services related to the treatment, distribution and storage of drinking water, sewage and storm water. Columbia Water has more than 375,000 constituents in the midlands. The department collects sewage from approximately 63,000 approved connections located along approximately 1,000 miles of pipe line both inside the City limits and in portions of both Richland and Lexington Counties. Columbia is made up of several watersheds, areas of land that drain to the same water body. The Columbia Water Stormwater Management Team partners with City staff, local businesses, City residents, and visitors to keep our waterways clean.

Through informal interviews, it was determined that service requests and resulting work orders in City Works ranged from water leaks in roadways to sewer backups in hallways. Each request came with its own unique set of circumstances to include causes, property ownership,

responsible parties, safety and liability issues, repair procedures and schedules, assigned teams, materials and costs. Columbia Water's response times are impacted by these circumstances.

Recommendations

The goal is to provide timely responses to service requests regardless of the point of contact. Initial responses to service requests will occur within one business day of receiving the request. We will create standard operating guidelines and conduct meetings with all subject matter experts to draft prerecorded responses and to personalize response times based on tasks to be performed. All service requests should remain open until the request has been fully addressed. Data collection is key. With effective citywide utilization, the current service request system will provide a means to standardize, control and improve the internal and external communications process.

- Track all tasks in a central location to increase visibility and communication.
- Utilize a single point of entry to streamline how we process requests.
- When a single point of entry is not an option, use a check sheet to compile data.
- Promote the request system with other agencies that can submit requests in lieu of placing calls.
- Develop on-demand training options.
- Create user accounts for elected officials and administration to view requests.
- Integrate CityWorks with the service request system.
- Deploy tablets for field service employees to have the capability to update work orders on the go. Based on a quote from the Information Technology Department, a 9.7" Apple iPad costs $810 each. The cost to supply devices to 23 field service employees is approximately $18,630.00.

Implementation Plan

	Action Item	Responsible Department	Due Date
1	Identify subject matter experts for each department	Constituent Care Department	30 days
2	Establish and communicate standard guidelines and key performance indicators	Project Management Office	30 days
3	Draft prerecorded responses and personalize response times based on tasks to be performed	Project Management Office and End User Departments	30 days
4	Create standard operating procedures	Project Management Office and End User Departments	45 days
5	Create training videos and guides	Constituent Services	30 days
6	Facilitate training for subject matter experts and clarify the goals	Program Management Office and Constituent Services	60 days
7	Facilitate peer-to-peer training for new hires, as needed	Subject Matter Experts	60 days
8	Complete system updates	Information Technology Department	75 days
9	Relaunch service request system	Constituent Services	90 days
10	Review open / closed requests by service type and identify process improvements	Internal Work Group	120 days

Anticipated barriers to successful implementation are personnel driven due to the practice of operating in silos and the creation of individualized processes. Having support from executive management is pivotal to holding team members accountable to closing the feedback loop. A couple of strategies that will help overcome the avoidance of accountability is to have periodic check-ins with the team and to share the goals, data, measures and results. The utilization of a decision tree would give front line and back office employees the autonomy to make decisions and thereby increase accountability. We should empower employees to fix any problem they see.

Existing resources such as Microsoft Word, SharePoint and YouTube will be utilized to provide training aides. There are no associated budgetary impacts related to training at this time.

Evaluation Method

An internal work group composed of individuals with a common commitment to constituent services will review data for open and closed requests 60 days after the service request system is relaunched. This group will review reports and make suggestions on process improvements on a monthly basis. The internal work group will also draft and publish a survey to capture the voice of the constituent. We can also survey members of the Council of Neighborhoods. We can conduct an outcome evaluation to determine the effectiveness of process changes.

We will use the following key performance indicators to evaluate how well we are responding to service requests:

Financial	Process	Service Quality	Customer	People
Cost per resolution	Percentage of overdue requests	Number of complaints	Customer satisfaction rating	Employee satisfaction rating
	Average time between service request and resolution	Number of escalations		Employee (SME) turnover

Appendix A

City Council Strategic Focus Areas

COLUMBIA CITY COUNCIL STRATEGIC OUTCOMES
April 28, 2022

The successful future of the City of Columbia will be secured by a focus on these Strategic Outcomes:

Economic Growth
Columbia is a capital city with a competitive tax and fee structure that welcomes new investment. The City's business recruiters specialize in urban economic development and are willing to go where it takes to bring back the best hospitality, retail, corporate opportunities, and investment capital to Columbia, while project managers work simultaneously to help our small businesses and entrepreneurs as well as those who have chosen to locate here.

Organizational Effectiveness
Columbia recognizes its mission is to serve the people who live and work in the City. The City invests in its people, technology, and training to achieve world class customer service in order to ensure every interaction with the City results in a positive experience.

Built Infrastructure
The City of Columbia provides safe, modern and customer focused infrastructure systems to serve the needs of our growing and diverse communities. As the largest municipal water, wastewater and stormwater system in South Carolina, the City provides over 3000 miles of modern infrastructure to protect public health and the environment, while utilizing best in class technology and efficient operations. Our expansive transportation network of high quality and well maintained roads, sidewalks, bike lanes, and greenways safely connects our communities. City parks, facilities, and equipment provide state of the art resources and amenities to enhance services and the quality of life for all our citizens.

Safe Communities
As one of the ten safest capital cities, Columbia provides public safety through advanced police and fire services and participates in a state of the art regional 911 communications center. We consistently rank below national crime rates as the result of a laser-like focus on community policing, leveraging technology, and strengthening relationships with partner agencies. Emphasis is placed on crime prevention by providing activities for youth, empowering neighborhoods, and working with school districts and non-profit organizations. The visible homeless population is almost non-existent due to a concerted effort to redirect service delivery to homeless providers and agencies with expertise in providing necessary services, including mental health, addiction, financial, and housing assistance. All applicable laws are enforced to ensure citizens and visitors are able to enjoy our safe community.

Beautification and Appearance
Columbia is a beautiful destination to live, work and play. Residents have equal access to wonderful amenities that encourage healthy lifestyles. Our city is walkable and bikeable. We strongly believe in taking care of the appearance of our city. Our streets are well maintained. Public spaces are well kept. Our neighborhoods are clean, safe, and livable. Our natural resources are preserved and available for all to enjoy.

Vibrant Community
Columbia is positioned as a city rich with arts and cultural opportunities that provides entertainment, a sense of community, and economic benefit. Columbia embraces diverse cultures and traditions while celebrating and honoring our history. We are known as a hospitable community with a wide array of dining, shopping, recreational, and social activities.

Communications
As a result of increased communication and outreach, Columbia is a proud city that is diverse, resilient, and inclusive. We embrace innovation, new ideas, and collaboration with our partners and community. Our community is engaged, empowered, and informed, thus giving us a strong sense of purpose and belonging.