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# **Creating & documenting a standard for District H Council Office's Constituent Services Process**



# Project Details


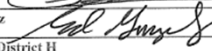
- **Department** – CNL-District H Constituent Services
- **Problem statement** – Due to unreliable/inaccessible data, the Constituent Services group is unable to provide real time information to the Council Member on the number of cases being reported per month to the office and on the average length of resolution. This has led to delays in follow-ups and inability to accurately track cases from intake to completion.
- **Mission statement** – To develop a system that will enable the Constituent Services group to report meaningful data to the Council Member and incorporate a process that will ensure continuity into the next administration with a focus on meeting Council Member needs and proactive communication/follow-up with city departments.

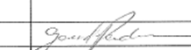
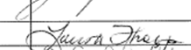
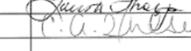
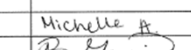
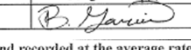


# Project Charter

## PROJECT CHARTER

City Council Constituent Services

Date:	12/15/2014	
Project Title:	Creating & Documenting a standard process for City Council Constituent Services	
Project Leader:	Thomas Pommier 	
Sponsor:	CM Ed Gonzalez 	
Department Description:	District offices, District H	

Team Member	Function	% Time
Thomas Pommier	Policy Analyst (CNL)	
Jerry Peruchini	Chief of Staff (CNL)	
Marvin Callies	Public Safety Supervisor (HAS)	
Laura Thorp	Director of Constituent Services (CNL)	
Carla Hulsey	Deputy Chief of Staff (CNL)	
Cody Miller	Council Aide (CNL)	
Michelle Alcocer	Council Aide (CNL)	
Brenda Garcia	Council Aide (CNL)	

Problem Statement:	X number of cases being reported per day and recorded at the average rate of Y cases per day and within Z days of being reported, resulting in unreliable records, as well as delays in follow-ups. Case resolutions are communicated to Council Office within ... days, on average, resulting in unreliable data collection.
Mission Statement:	Increase the average rate of case recording to X cases per day and decrease batching so that cases are recorded within 0 days of being reported, over the next # months (by //, //, //, ...), resulting in reliable records and timely follow-ups. Improve communication with City Departments so that case resolutions are communicated within 0 days, resulting in reliable data collection.
Stakeholders:	District office, employees, City Departments, Council Member, constituents.

Project Scope	
Process Start:	When a constituent calls or emails his/her District office to report an issue or complain about delays in the resolution of an issue reported to 311. Or when a District H staff member personally reports an issue to 311.
Process End:	When issue has been resolved and said constituent has been contacted to confirm his/her satisfaction. Or when issue has been resolved and constituents in the area were made aware of the office's involvement in the resolution.
In Scope:	
Out of Scope:	



# Voice of Customer (1/3)

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## **- Interview -**

***with Council Member Ed Gonzalez***

- The Council Member was identified as the sole customer of Council Office's Constituent Services process.



## Voice of Customer (2/3)

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- Outputs identified:
  - Number of cases/month (with yearly aggregate).
  - Average speed of issue resolution.
  - Possibility to break down aforementioned data geographically and by department and/or issue-type.



# Voice of Customer (3/3)

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- Other requirements identified:
  - Built-in time frame expectations and thresholds by types of issue.

If the threshold is reached, the Chief of Staff must be alerted.



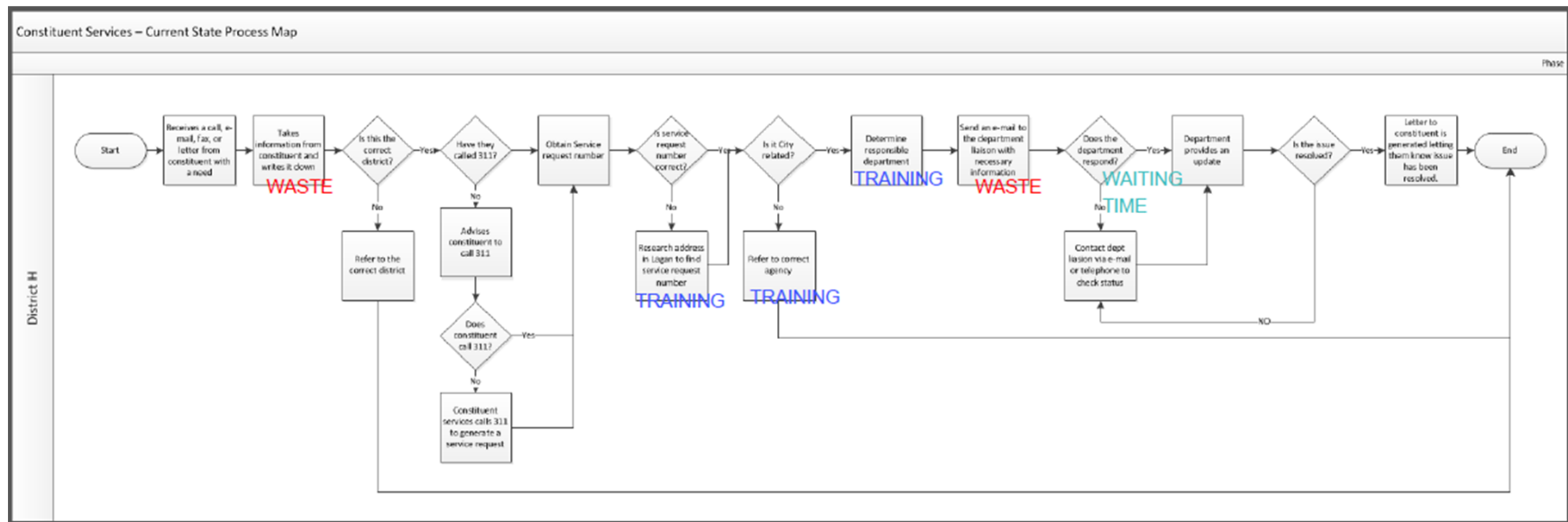
# Baseline Measurements

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- No reliable data available – due to lack of standard.
  - Multiple record methods existed simultaneously.
  - Batching happened both before creating tasks on Asana (resulting in unreliable creation dates),
  - and before generating letters (resulting in unreliable completion dates).



# Current State Process Map







# Standard Work (1/3)



CITY OF HOUSTON  
WORK INSTRUCTION

<b>1.0 PURPOSE</b>	
The purpose of this procedure is to provide standard systems of instructions and to assign responsibilities for:	
1.1 Dealing with constituent concerns (via phone, email, or in person)	
1.2 Referring issues to the appropriate City Department Liaison	
1.3 Recording constituent cases	
1.4 Notifying constituents of updates	
1.5 Notifying constituents of completion	
<b>2.0 SCOPE</b>	
This procedure applies to District H Constituent Services, from issue referral through issue resolution.	
<b>3.0 DEFINITIONS</b>	
3.1 Asana Acronyms	p. 3
3.2 Asana Miscellaneous Project	p. 3
<b>4.0 ASSOCIATED DOCUMENTS</b>	
4.1 Process map	p. 4
<b>5.0 INSTRUCTIONS</b>	
Constituent Input Form, Asana, MyCityMap and Lagan should be open and ready to access at all times.	
5.1 Constituent notifies CHL – District H of concern via phone, email, or in person	p. 5
5.1.1 Constituent Input Form	p. 5
5.1.1.1 Screen shots	p. 5
5.1.1.2 Procedure	p. 5
5.1.2 Asana	p. 7
5.1.2.1 Screen shots	p. 7
5.1.2.2 Procedure	p. 7
5.2 City Department Liaison gives an update	p. 8
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5.2.2 Procedure	p. 8
5.3 City Department Liaison notifies CHL – District H of completion	p. 9
5.3.1 Screen shots	p. 9
5.3.2 Procedure	p. 9



CITY OF HOUSTON  
WORK INSTRUCTION

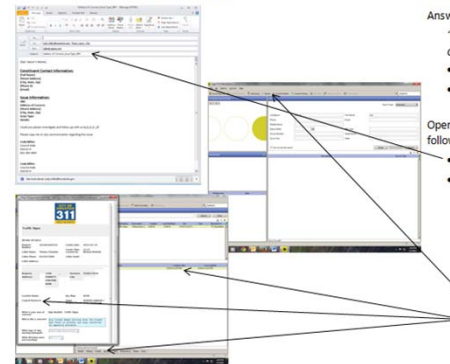
## 1.0 INSTRUCTIONS

*Constituent Input Form, Asana, MyCityMap and Lagan should be open and ready to access at all times.*

### 5.1 Constituent notifies CHL – District H of concern via phone, email, or in person

#### 5.1.1 Constituent Input Form

##### 5.1.1.1 Screen shots



##### 5.1.1.2 Procedure

Answer the phone (before the 3<sup>rd</sup> tone):

"Hello, (or Good Morning, Good Afternoon)

Council Member Gonzalez' Office, this is [your name], how may I assist you?"

- Let the constituent explain the issue first.
- Then tell the constituent you will need to fill out a form for them and that you will be asking them specific questions.

Open the email template - saved on your desktop - and fill out the form, as follows:

- Start with the subject line.
- Ask the constituent if the issue was reported to 311 and ask for the Service Request number (SR#).

IF constituent did not report to 311:

- o Ask constituent to call 311 and save form as Draft (File/Save).

IF constituent refuses:

- o Call 311

IF constituent does not remember the SR#:

- Search case in Lagan, and retrieve SR#.

- Verify District (eForms/double-click on green band).

IF in District H:

- Continue procedure.

IF not in District H:

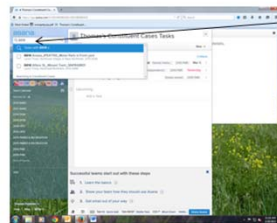
- Refer constituent to the appropriate Council office.
- Discard email and end procedure.



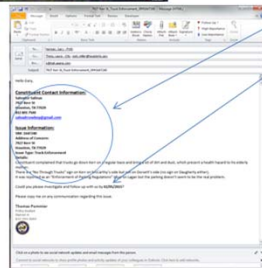
# Standard Work (2/3)



## CITY OF HOUSTON WORK INSTRUCTION



- Search Asana using the address of concern (to avoid duplicates).
- |   |  |
|---|--|
| <b>IF a completed task exists:</b>              | <b>IF an open task exists:</b>   |
| - Uncheck the box.                              | - Verify the information and give the constituent an update (if applicable). |
| - Change the SR# - in the title <i>only!</i>    | - Add a comment and notify the assignee (if necessary).                      |
| - Add a comment.                                | - Discard the email and end procedure.                                       |
| - Notify the assignee (if necessary).           |  |
| - Delete BCC field before continuing procedure. |  |
- IF no task exists:**
- Continue procedure.



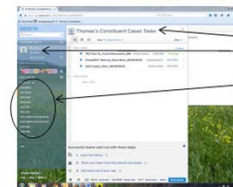
- Ask the constituent to provide you with the rest of the information and finish filling out the form.
- Fill out the due date by referring to the guidelines – saved on your desktop. If you are unsure, ask the Director of Constituent Services.
- IF you are waiting for guidance from the Director of Constituent Services:
  - o Save form as Draft (File/Save).
- Send to appropriate City Department Liaison.

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## CITY OF HOUSTON WORK INSTRUCTION

### 5.1.2 Asana 5.1.2.1 Screen shots

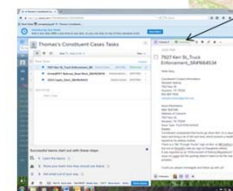


### 5.1.2.2 Procedure

Since Asana is blind copied (BCC) in the email, a task is automatically created with the email subject as the title and the email body as the description.

This task can be found under "My Tasks" in the "Constituent Cases" workspace.

- Move the case into the corresponding department project folder.
- Look up the super neighborhood of the address of concern in My City (Locate Address/Locate/Jurisdiction Info), OR in Lagan, AND tag the project accordingly. Type the first letters *only* and select from dropdown menu (otherwise you will create a duplicate tag).
- Make the due date the same as what you sent in the email (unless you were given a prior date by the City Department Liaison).



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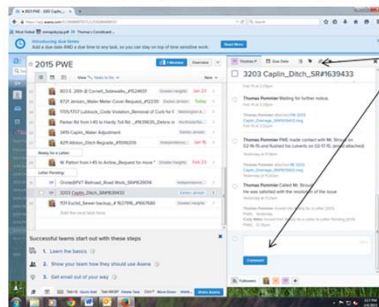


# Standard Work (3/3)



## 5.2 City Department Liaison gives an update

### 5.2.1 Screen shots



### 5.2.2 Procedure

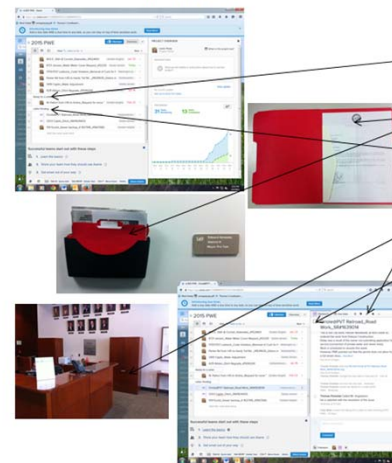
- Use the comment section to enter additional information or follow-ups on the case.
  - Attach any pictures or emails as needed.
  - Call the constituent to keep him/her informed of the developments (if applicable).
  - Change the due date (if applicable).
  - ***Never overpass the due date stated in the description (initial email to the City Dpt. Liaison).***
- IF the case was not resolved by the due date stated in the description, notify the Chief of Staff.

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## 5.3 City Department Liaison notifies CNL – District H of completion

### 5.3.1 Screen Shots



### 5.3.2 Procedure

- Once the case is resolved, call the constituent to make sure that he/she is satisfied.
- Move the task under the "Ready for Letter" section.
- Write a letter to the constituent, using the template saved on your desktop.
- Print both the letter and the envelope and place them in the red folder, in the Council Member's box, for signature.
- Move the task under the "Letter Pending" section.
- Once the Council Member has signed the letter, scan the letter and attach the scanned document to the task in Asana.
- Seal the envelope and deposit it in the outgoing mail drawer, in the lobby (reception).
- Mark the task as complete.

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# Due Date Guidelines

CNL - DISTRICT H  
DUE DATES GUIDELINES FOR 311 SERVICE REQUEST

Use this index to help you report an issue or problem to City Department Liaisons (or to entities outside the City) and request an answer by a certain date - updated 3/24/2015		
Department	Issue Types	Days to Complete
<b>BARC</b>		
	Dog bite / Animal attack	1
	Live Animal in Storm Sewer	2
	Stray dogs / animals	5
<b>DON</b>		
<b>Apartment Complex Concerns</b>		
	Building Concern in a Multi-Family Habitation	180
	Code Violation Report for Multi-Family Housing with 3 or More Units	180
	Landlord Violation in a Multi-Family Habitation	180
	Unregulated Boarding House	180
	Unsafe Boarding House	180
<b>Dangerous Buildings</b>		
	Neighborhood Danger or Nuisance	180
	Dangerous Building on Private Property	180
	Dangerous Building Open and Vacant	365
	Building Code Violation	7
	Construction Code Violation	7
	Violation of the Minimum Standards Housing Code for Single Family Buildings	180
<b>Trash related Concerns</b>		
	Schedule Neighborhood Clean-up	10
	Dumping in Ditches, Inlet or Bayou	30
	Heavy Trash Violation	30
<b>Other Concerns</b>		
	Junk/Inoperable Vehicle	180
	Nuisance on Property - Trash, Substances, Weeds	180
	Remove graffiti on Private Residential or Commercial Property	30
<b>HPD</b>		
<b>Neighborhood Safety</b>		
	Report a Break-in	1
	Report Disturbances	1
	Report Illegal Activity	30
<b>Traffic</b>		
	Speeding / Traffic Enforcement	30
	Truck Enforcement	30
<b>Environmental</b>		
	(Sylvia.Brumlow@HoustonPolice.Org)	
	Dumping in Drainage System	30
	Litter Removal From Esplanade/Median	14



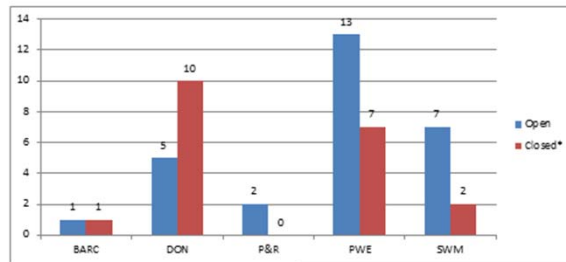
# Measurement System (1/3)

- A staff member has been assigned the following tasks:
  - Regularly check Asana records.
  - Produce a monthly report including:
    - Number of tasks created during the month.
    - Number of tasks completed during the month.
    - Year to date aggregate.
    - Average speed of completion.



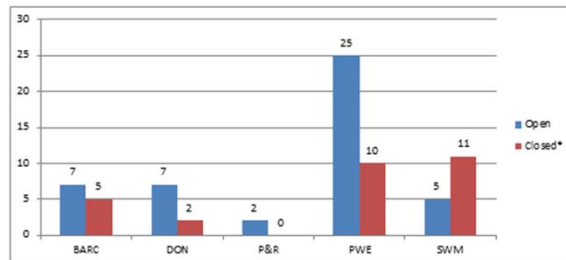
# Measurement System (2/3)

February Month to Date Tasks



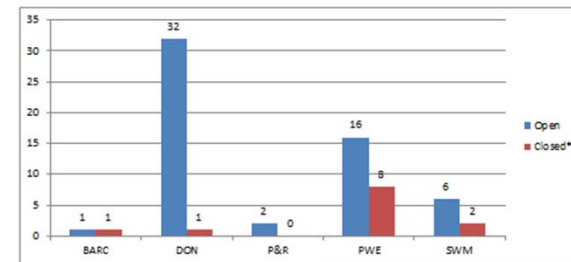
\*NOTE: Tasks closed denotes tasks that were closed in the month; it does not necessarily mean that tasks were started in this month.

March Month to Date Tasks



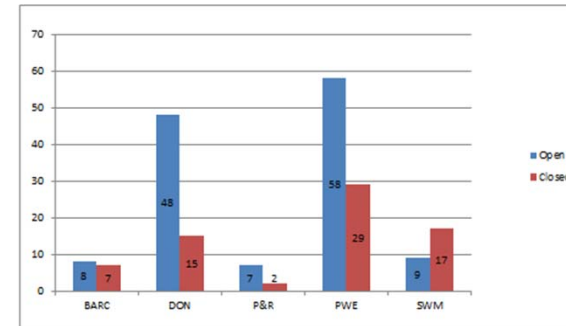
\*NOTE: Tasks closed denotes tasks that were closed in the month; it does not necessarily mean that tasks were started in this month.

April Month to Date Tasks



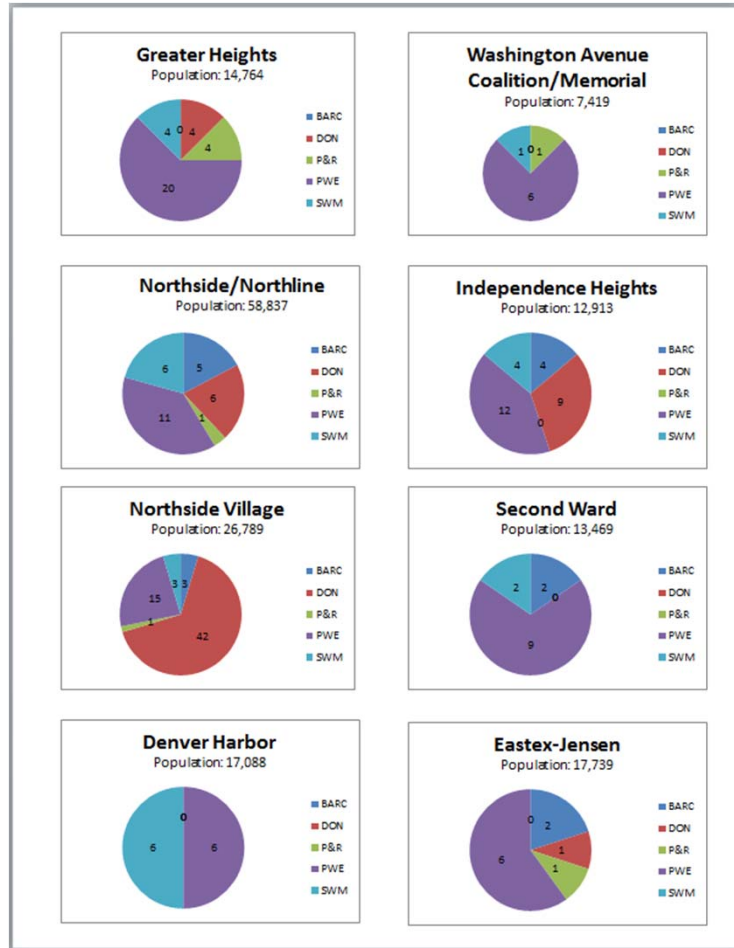
\*NOTE: Tasks closed denotes tasks that were closed in the month; it does not necessarily mean that tasks were started in this month.

TOTAL Tasks





# Measurement System (3/3)



Time to Complete Task from Call in Date to Letter Sent (March 30)

**Overall Time to Complete:**

Mean: 20.36 days  
Median: 20.5 days

**BARC Time to Complete:**

Mean: 21.8 days  
Median: 19 days

**DON Time to Complete:**

Mean: 21.3 days  
Median: 21 days

**P&R Time to Complete:**

Mean: 14.5 days  
Median: 14.5 days

**PWE Time to Complete:**

Mean: 19.16 days  
Median: 17.5 days

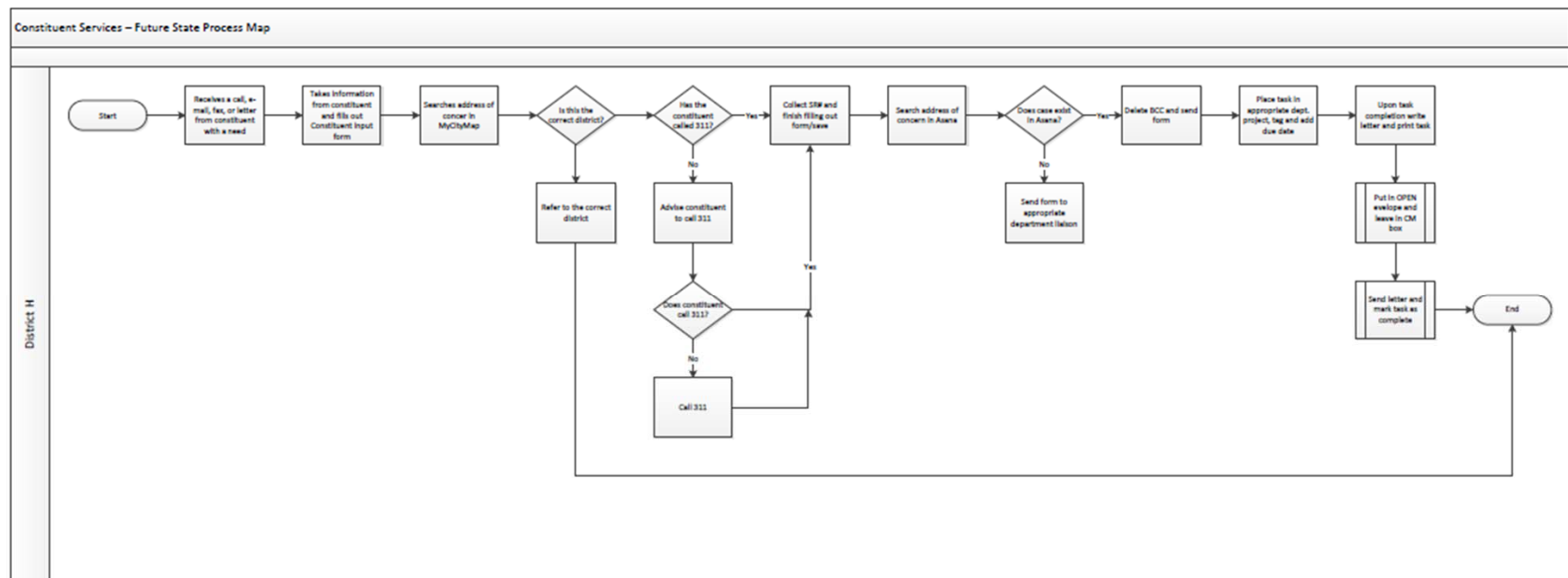
**SWM Time to Complete:**

Mean: 21.46 days  
Median: 15 days





# Future State Process Map







# Recommendations

- In view of the upcoming implementation of InFor citywide, we recommend that Council offices request the following functionalities:
  - Direct access to case reports.
  - A way for Council staff members to follow cases referred to them without having to contact department liaisons and wait for their answers.
  - A way to see who else is following the case to avoid duplication of efforts.
  - A way to extract reports.



## InFor (1/3)

- Provides a great mechanism for entering work orders.
- Automated tracking of work orders
- Follow up on work orders is simplified
- Reporting is of a broad scope based on departmental needs
- Creates consistency throughout all districts.
- City Of Houston owns INFOR currently using in Houston Airport System.



The screenshot displays the Infor EAM application interface within a Windows Internet Explorer browser window. The top navigation bar includes tabs for 'Work', 'Materials', 'Equipment', and 'HAS Reports'. Below this, a blue header bar contains the text 'Work Order:' and fields for 'Organization:', 'Status:', and 'Asset:'. A toolbar with various icons is positioned below the header. The main content area features a tabbed interface with 'List View' selected. A search bar labeled 'My Open Work Orders' is active, and a dropdown menu is open, listing various work order types and descriptions. The dropdown menu includes options like 'Temporary Fix Promise ...', 'Tenant Charge Back', 'To Point', 'To Point Geographical ...', 'To Point Ref. Description ...', 'Trade', 'Trigger Event', 'Type', 'Type Code', 'Warranty', 'Work Address', 'Work Order', 'Work Package', 'eSignature', 'eSignature Date', and 'eSignature Type'. The main table area is currently empty, showing only the column headers: 'Work Order', 'Date / Time Reported', and 'Description'. At the bottom, a status bar indicates 'Records: 0 of 0' and a page number '123'.



# INFOR (3/3)

## Reports

Infor EAM

Work

Materials

Equipment

HAS Reports

Work Order: 99980 HOT\*\*PROPERTIES/2ND FLOOR/NORTHWEST CORNER

Organization: IAH

Status: Closed

Asset: IAH.BLDG.LS

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# Control Plan

- **InFor:** We started discussing the early implementation of InFor throughout Council Offices with the Finance Department, as well as with the other Council Offices.



# Lesson Learned

- There is opportunity for improvement in the way that information is received and processed by multiple city departments.
- Using one unified system with equal access to data for all process participants would eliminate redundancies and allow for faster flow of information.
- Elected offices should influence software/OS decisions based on usability by not only their offices, but also those responsible for process.



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# Questions?