

311 Toronto - Framework for Reporting and Dashboards

Date: May 16, 2024
To: Service Excellence Committee
From: Executive Director, Customer Experience
Wards: All

SUMMARY

The purpose of this report is to provide an update to the Service Excellence Committee on the Customer Experience (311) Division's plans for a new reporting framework and feature that incorporates Ward Dashboards and key performance indicator (KPI) data for 311 Toronto (311) Integrated Service Divisions, as well as a framework for future reports to highlight key trends.

This report will:

- Provide an overview of existing 311 information available to Councillors, divisions, and the public.
- Provide information on the progress towards the establishment of Ward Dashboards and KPI data related to specific City divisions.
- Provide high-level next steps to producing Dashboards.
- Outline the framework under which the Customer Experience Division (CXD) currently reports on and plans for emerging trends, seasonal, cyclical, and geographic patterns or trajectories and how new Dashboards will complement these efforts.
- Provide a sample Proof of Concept Dashboard.

RECOMMENDATIONS

The Executive Director, Customer Experience recommends that:

1. Service Excellence Committee receive this report for information.

FINANCIAL IMPACT

There is no financial impact from the adoption of the recommendations in this report. The Chief Financial Officer and Treasurer has reviewed this report and agrees with the financial impact statement.

DECISION HISTORY

At its meeting on April 9, 2024, the Executive Committee Requested the City Manager, in consultation with the Executive Director, Customer Experience (311), to report back to the Service Excellence Committee (SEC) with:

- A plan for a developing a new reporting system that incorporates Ward Dashboards and key performance indicator data for 311 integrated service divisions, including a plan to make service targets and performance against those targets publicly available.
- A framework for future reports to highlight emerging trends, seasonal, cyclical, and geographic patterns, or trajectories.
- A prototype report Ward Dashboard to be demonstrated by Q3 2024
- Confirmation that the new reporting Dashboard will track the top 10 service request (SR) categories for each 311 integrated service division for all Wards.

<https://secure.toronto.ca/council/agenda-item.do?item=2024.EX13.14>

At its meeting on March 19, 2024, the Service Excellence Committee considered item [SE2.3](#) and made a recommendation to the Executive Committee to request the City Manager, in consultation with the Executive Director, Customer Experience (311) to report back to the Service Excellence Committee on a plan to implement new reporting feature and framework for reporting on Ward Dashboards and key performance indicator data for 311 integrated service divisions.

<https://secure.toronto.ca/council/agenda-item.do?item=2024.SE2.3>

COMMENTS

Reporting Plan Framework

Initial Ward Dashboards – Q3 2024

In Q3 2024, CXD will implement the first iteration of Ward Dashboards for councillors, providing regular updates (monthly or quarterly) on the top 10 SRs initiated for ISDs which will be generated manually. The following table provides a summary of key activities.

Activity	Overview
Needs Assessment (Q1 and Q2 2024)	<ul style="list-style-type: none"> Workshops with ISDs to complete a current state assessment, define reporting and Ward Dashboard requirements & approach.
Proof of Concept and Ward Dashboard Development (Q2 and Q3 2024)	<ul style="list-style-type: none"> Development of a Ward Dashboard report to demonstrate the functionality and capabilities of the final dashboards. Based on feedback from PoC, the team will develop the complete set of ward dashboards.
Availability of ward dashboard reports to Council members (Q3 2024)	<ul style="list-style-type: none"> Ward Dashboards distributed and available to councillors in Q3 2024.
Availability of ward dashboard reports to the public (Q3/Q4 2025)	<ul style="list-style-type: none"> Public rollout of Ward Dashboards.

Enhanced Ward Dashboards

The plan is to continue iterating on the Dashboards and fully implement a robust automated self-service Ward Dashboard solution. A jointly owned plan will be developed and resourced with the ISDs and TSD to outline the cost, effort, timeline, and resourcing impacts of these activities to fully automate the Ward Dashboard. Key activities for this work are defined below.

Activity	Overview
Continued Needs Assessment	<ul style="list-style-type: none"> Continued ISD engagement to understand processes, data, tools, and technology requirements, resulting in recommendations to enhance integrated processes, workflows, data, and enterprise tools.
Environmental Scanning	<ul style="list-style-type: none"> Divisional jurisdictional research, industry best practices and benchmarking for Service Level information.
Data integration	<ul style="list-style-type: none"> Determining if proactive, internal work orders created by divisions should be included in future reporting.

Activity	Overview
Data Consistency	<ul style="list-style-type: none"> Aligning service standards between 311 and divisional customer facing Service Standards webpages.
Councillor Engagement	<ul style="list-style-type: none"> Continue engagement with SEC and Councillors for feedback and input into design enhancements and iterations for the Dashboards.
Solution Selection & Licensing Requirements	<ul style="list-style-type: none"> Selection of a suitable Dashboard platform (e.g., Tableau, Power BI, etc.). Identification of licensing model and requirements.
Design & Usability	<ul style="list-style-type: none"> Designing a user-friendly layout with interactive features and drill-down capabilities.
Accessibility	<ul style="list-style-type: none"> Ensure the solution is accessible and compliant with the Accessibility for Ontarians with Disabilities Act (AODA).
Build and Implementation	<ul style="list-style-type: none"> Developing a multi-phased rollout plan, accommodating for iterative testing, enhancements (e.g., service standards data, heat maps, etc.) and releases.
User Training & Support	<ul style="list-style-type: none"> Provide training and support materials for councillor offices and staff.
Reporting & Distribution	<ul style="list-style-type: none"> Determine access, distribution, and frequency of reporting/dashboard updates.
Automation	<ul style="list-style-type: none"> Fully automated Ward Dashboard launched.

CXD will communicate additional steps, potential scope or process changes and plans with Councillors as the Dashboards are developed. Additionally, as the joint planning for this initiative continues, there may be a funding gap identified that will be brought forward through the 2025 budget process.

Overview of 311 Services and Integrations

- 311 provides residents, businesses, and visitors with 24/7 access to non-emergency City services, programs, and information through the channel, device, and language of choice.

- 311 Toronto provides general information about programs and services for all City Divisions and intakes service requests (SRs) on behalf of the following five integrated service divisions (ISDs):
 - Transportation Services
 - Toronto Water
 - Solid Waste Management Services
 - Municipal Licensing and Standards
 - Urban Forestry section within the Parks, Forestry and Recreation division.
- 311's Customer Relationship Management (CRM) system, Salesforce, is integrated with various ISD work management systems (e.g., Maximo, TMMS, IBMS, Chameleon, HANSEN) to intake and route SRs for fulfillment. This integration allows for information flow between the ISDs and 311 Toronto on the fulfillment status of the SRs.
- Each SR has a defined service standard which represents when the SR will be initially responded to, investigated, or completed by a division. The public are provided the defined service standard for a SR during intake; however, service standards may be affected by the volume and frequency of SRs. Additionally, upon investigation some SRs may require creation of work orders to fully resolve the issue. In those cases, ISDs share the work order notes and details with 311.

Existing Available Information and Reporting

311 currently responds to general inquiries about City programs and services for all City divisions and intakes service requests for ISDs. 311 tracks the following information:

- Total contact volumes, including by channel, Ward, division, and interaction type (e.g., SR, General Inquiry and Status Inquiry)
- Percentage of phone calls answered by 311 Customer Service Representatives within the defined service level
- Top 10 General Inquiries
- Top 5 SRs by division and by Ward
- SR Volume Heatmap by Ward

CXD provides the above information through the following:

- Monthly key metrics to Councillor offices, including Ward-specific and division-specific data
- Key metrics reports to Councillor offices as part of the quarterly CXD briefing note
- Key metrics reports as part of the annual CXD report to Committees and Council
- Business Intelligence Tool SR data, whereby City staff and Councillor's Office staff can run volume reports by division, Ward, location, and problem type
- Monthly data on customer-initiated SRs received by 311 for ISDs is published on the City's [Open Data Catalogue](#)
- Ad-hoc reports as requested

CXD has undertaken the following activities to support planning and implementation for the new reporting system featuring ward level Dashboards and KPIs for SRs submitted to 311.

(1) Workshops and Engagement with 311's Integrated Service Divisions

In Q1 and Q2 2024, CXD held a series of workshops with the ISDs focusing on data quality assurance and standardization as an initial step to support the development and rollout of Ward Dashboards. Key activities of these workshops included:

- Assessing and validating SR data for each ISD, including the number of SRs and service standards assigned to each SR.
- Assessing and documenting business processes, operational practices, tools, technology, and other nuances in each ISD and their backend systems, to improve accuracy and consistency in reporting and enhance the interpretation of results and data.

CXD will continue to collaborate with ISDs through additional workshops to further define and align on reporting processes, KPIs and data.

(2) Development of a Proof of Concept Solution with Technology Services Division

Since January 2024, CXD has been collaborating with Technology Services Division (TSD) to develop a Proof of Concept (PoC) solution to support the extraction, transformation and loading of 311 SR data for ISDs into Ward Dashboards. The goal is to streamline and present information in an accessible and intuitive format. CXD intends to publish SR volumes and trends City-wide, by Ward, and by ISD, and will likely include the following:

- SRs created YTD and by month
- SRs completed YTD and in the previous month
- SR previous month summary by status
- Top 10 SRs in the previous month
- SR monthly creation volume trend

The PoC will enable the development of automated Dashboards that provide accurate and meaningful performance data on an ongoing, monthly, or quarterly basis. Ward Dashboards will initially be made available to councillors in Q3 2024 and with a public rollout planned for 2025.

(3) Dashboard Framework

The March 19th report to Service Excellence Committee, [311 Reporting and Dashboards](#), includes seven sample PoC Dashboards that demonstrate the potential to customize the slicing of data to assist in the identification of emerging trends, seasonal, cyclical, and geographic patterns, or trajectories. For example, the Top 10 SR types by month will enable users to identify seasonal trends in the types of SRs that are more

prevalent during certain times of the year. Additionally, by viewing the types of SRs in each Ward, divisions can leverage this information to resource plan accordingly and ensure adequate staff coverage in specific areas of the City. Dashboards can further assist with resource planning by identifying SR types that are not meeting their service standards and therefore may not be resourced/prioritized accordingly.

In Q2 of 2024, CXD and TSD continued collaboration to generate three new sample Dashboards to further support the generation of valuable insights and resource plans. These new Dashboards are filterable by Ward, month, division, and request type, and demonstrate the potential to customize the slicing of data to assist in the identification of emerging trends, seasonal, cyclical, and geographic patterns, or trajectories. The scope of the Ward Dashboard is the five 311 integrated service divisions (ISDs). Refer to Appendix 1 – Filterable Proof of Concept Dashboards for the three new sample Dashboards.

(4) Trend Analysis and Planning

CXD proactively generates insights to assist in identifying emerging SR and general inquiry trends, seasonal, cyclical, and geographic patterns, or trajectories which can be leveraged to support the Ward Dashboard. The following list provides examples of how CXD plans ahead, leverages trend analysis data, and works with partners to provide important insights and assist in essential service planning:

- CXD keeps 311's knowledge base up to date with timely, new, and updated information based trending inquiries from the public and emerging call drivers. For example, knowledge base articles were created during the Alcohol in Parks pilot program to ensure that increases in call volume and general inquiries on this topic could be appropriately handled.
- 311 and ISD partners leverage trending data to support service delivery (e.g., pothole blitzes, elections, and other planned events or emerging unplanned events (e.g., weather event)).
- CXD and Transportation Services staff meet before, during and after winter season to share trending issues, insights and lessons learned and identify areas of improvement. Additionally, in advance of large snow events, CXD and Transportation Services coordinate proactively to ensure messaging is accurate and aligned.

The sample dashboards provided in Appendix 1 will allow for various and flexible filter driven views of data across Wards, ISDs and Service Requests. This will support the ability to identify new emerging or cyclical trends. For example, a higher-than-average number of sudden low water pressure calls in a particular Ward may alert Toronto Water to a particular situation requiring attention.

CXD will also evaluate the feasibility of including relevant emerging trend information currently captured by 311 into the Ward Dashboard, where appropriate (e.g., storm event driving increase in number of service requests related to storm cleanup requests for Urban Forestry).

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SIGNATURE

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ATTACHMENTS

Appendix 1 – Filterable Proof of Concept Dashboards