

City of Toronto
Service Efficiency Study Program:
311 Toronto Division

Statement of Work for External Management Consultants
Roster Assignment #9144-11-7001-Cat2MC23-12

October 25, 2012

1. Background

- a) The City Manager has established a Roster for the provision of consulting services for a range of Assignments (REOI # 9144-11-7001).
- b) This Statement of Work (SOW) is provided in accordance with the requirements of the REOI, and the Assignment will be conducted within the terms and conditions stated in the REOI, especially Appendix B, and its Addenda. For purposes of clarity, some REOI terms and conditions may be repeated in this SOW.
- c) The City Manager wishes to engage an external Management Consultant to assist with Toronto's Service Efficiency Study of the 311 Toronto Division.
- d) As set out in the City Manager's report to Council dated January 6, 2012 (refer to D. in Section 7) the City continues to face difficult decisions in 2012 and future years to meet its budget challenges. To support City Council's budget deliberations in 2013 and beyond, the City Manager will undertake Service Efficiency Studies of several City divisions, agencies, and cross-cutting functions.
- e) Invited Consultants are required to submit a proposal and work plan tailored to the Service Efficiency Study or Studies as described in this SOW. The submission will include, at a minimum:
 - o Proposed work program with work plan and deliverables;
 - o Time schedule;
 - o Identification of call centre subject matter expertise as part of the team;
 - o Any other information required in response to this SOW; and
 - o Total costs/fees.
- f) Proposals submitted by invited Consultants will be assessed in terms of completeness of the work program, understanding of the assignment, appropriateness of methodologies, appropriateness of the Consultant

team, acceptable time frame and schedule for the work, and acceptable cost.

- g) An interview may be held at the sole discretion of the City to refine service scope, prioritize issues, or review the respective responsibilities between the City staff team and the Consultant and proposed team members.
- h) An agreed upon work plan including timelines and deliverables and cost/fees will be approved by the City prior to the commencement of the assignment, through a Letter of Agreement.

2. Project Purpose

The City has begun a program of Service Efficiency Studies. Several areas have been identified for review during 2012 including the 311 Toronto Division. The purpose of the Service Efficiency Studies is to identify and supply actionable recommendations that will provide the maximum of service efficiency savings in the shortest period of time. To that end, the project review should consider a broad range of strategies and apply the most effective methodologies to achieve the stated purpose, for example:

- Business process and work methods streamlining;
- Organizational restructuring;
- Outsourcing;
- Automation;
- Shared services;
- Service innovation; and
- Service adjustments.

The results of the Service Efficiency Studies will be reported to the City Manager and will be implemented through the annual budget process whenever possible.

3. Services Required – Overall Role & Deliverables for External Consultant

a) Background Data & Information:

The 311 Toronto Division, in consultation with the City Manager's Office, will provide general background data and information, including:

- (i) Suggested areas of study focus to be reviewed and assessed by the Consultant (provided in Section 5C, Study Focus);
- (ii) Information on services, service levels and standards, activities and types;

- (iii) Financial and budget data;
- (iv) Organization charts;
- (v) Workforce data including staffing information;
- (vi) Recent organizational and service reviews, policy directions, reports, and Council decisions;
- (vii) Business process data including call metrics;
- (viii) All other available information related to particular services and activities such as the 311 Customer Service Strategy Report (Sept 2004), and the City's Core Service Review findings respecting 311 efficiency opportunities (Sept 2011).

b) Consultant Deliverables:

Working with City staff, the external Management Consultant's role and deliverables will include:

(i) *Confirm Focus Areas and Methodology*

Using the baseline information, initial focus areas suggested by the City and additional data, identify the areas of focus and the most appropriate methodologies with the greatest potential for cost savings and improved service delivery.

(ii) *Assess Service Efficiency*

Within the areas to be focussed on:

- Identify and assess the costs and cost drivers of current practice;
- Review and assess services, activities and methods;
- Compare against service providers in other jurisdictions using comparable and relevant best practices;
- Analyze and compare service benchmarks and measures; and
- Assess against other relevant information.

(iii) *Identify and Recommend Opportunities for Improved Efficiency and Cost Savings*

- Identify and recommend changes to work methods, processes, responsibilities, and other factors that will result in the most cost savings and the greatest improvement in service delivery;
- Identify opportunities for introducing more cost-effective and efficient program delivery applications that would result in the same benefits;
- Provide cost savings estimates and implementation details and steps that will address the changes you have identified and recommended;

- Provide advice and recommendations about which changes can be made quickly, e.g., savings in 2013 or 2014, and which will take longer to implement;
- Identify and provide advice on the costs required to make changes including any short term financial investments; and
- Provide advice about any risks and implications for service delivery, policy development, finances, cross divisional or enterprise wide human resource impacts, and other effects of alternatives and changes.

(iv) *Provide reports and documentation*

Provide documentation, reports and presentations for the City Manager as required for each of the deliverables and providing other advice as identified throughout the review process.

(v) *Work with divisional and agency staff as required.*

(vi) *Attend, support and provide documentation for status and/or planning meetings with the City Manager, the designated Project Manager, the City staff team, the City Steering Committee established for Service Review activities, and/or other officials as may be required.*

4. Project Reporting Process and Time Line

- a) The Service Efficiency Studies will be conducted on an accelerated timeline;
- b) The City wishes to engage the external Management Consultant by no later than November 15, 2012, with completion of the final report by January 24, 2013 or earlier; and
- c) Wherever possible the results of the Service Efficiency Studies will be reported out through the City's 2013 Budget Process.

5. Service Efficiency Study – Specific Areas of Review for 311 Toronto

5A. Overview of the 311 Toronto Division

The City has recently introduced a number of significant customer service improvements initiatives. The largest was the introduction of 311 Toronto in 2009. With its 24/7 Contact Centre service offering over 180 languages, 311 Toronto transformed customer service by making it easier for customers to reach the information and service they need for many City services by using that single three-digit number.

Toronto is the largest 311 operation in North America that features end-to-end integration with the workforce management systems used by the divisions that carry-out service work (e.g. Transportation Services; Toronto Water and Solid Waste Management, among others). This means customers can get more of the services they need with one call leading to a First Call Resolution rate over 70%. The 311 Toronto Contact Centre is located in the former Council Chambers of the City-owned Metro Hall. With its extensive use of floor to ceiling windows and brushed stainless steel and wood fixtures, the 311 Toronto Contact Centre is considered a state of the art facility. The Contact Centre uses Lagan as its Customer Relationship Management software (CRM), Verint as its Workforce Management software and Cisco as its telephony system.

The 311 Toronto Division consists of two programs: 311 Project Management Office (PMO) and the 311 Operations.

The 311 PMO was created in 2004 under the City Manager's Office to lead the development of the 311 Operations. Following the launch in 2009, the PMO has continued to develop additional phases of system integration with divisions and has led the work to add new features to further enhance customer service through its self-serve options including the ability to place and track Service Requests online for work provided by many City divisions, as well as via mobile applications and through Twitter.

There are 4 distinctive units in the 311 Operations program:

- a) Contact Centre: The Contact Centre, with its 121 FTEs, manages the day to day direct contact with the customers via the telephone, emails and also handles some on-line service triage.
- b) Information & Business Development: The Information & Business Development unit, with 8 FTEs, supports the Contact Centre through the management of the information database, development of scripting for service requests, and the development of new business processes. It is also responsible for the business information and business reporting functions, both internally for 311 Operations itself (e.g. call centre metrics, speech analytics) as well as for divisions (service request data).
- c) Technical Support: This unit has 16 FTEs to sustain (i.e. maintain and support) the technical infrastructure of the division. It also works with the Project Management Office to develop new systems and expand 311's functions and features.

- d) Finance & Business Services: The Finance & Business Services unit, with 8 FTEs, is responsible for the divisional budget, human resources, purchasing and payroll issues, and other administrative matters.

In 2011, the 311 Toronto Contact Centre managed over a million customer contacts of which more than 90% were handled by telephone (with another 8% initiated by email, and 1% of contacts through online self-serve users).

The approved operating budget of the 311 Operations is \$ 1.8 M gross, which includes dedicated I+T support.

5B. Core Service Review

In 2011, Toronto conducted a Core Service Review of all its services and agencies with assistance from KPMG LLP. The Core Service Review examined what services the City delivers and at what service level. Using a core service filter, the City's services were assessed along a core continuum and ranked by the following categories:

- **Mandatory:** required by legislation;
- **Essential:** critical to the operation of the City;
- **Traditional:** provided by virtually all large municipalities for many years; and
- **Other/Discretionary:** provided by the City to respond to community needs.

KPMG also put forward options and opportunities for the City's consideration to change services and service levels, provided preliminary information on the risks and implications of making these changes, potential timelines for implementation, and a high level order of magnitude of potential savings for each opportunity.

The opportunities identified through the Core Service Review related to the 311 Operations as stated by KPMG, are to:

"Consider outsourcing some 311 activities to the private sector."

A potential savings of up to 5%, with medium risk and low level barriers, was identified by KPMG LLP as being associated with that opportunity.

The City's preliminary investigations into this potential efficiency opportunity have revealed that while outsourcing of contact centres is a mature field in the private sector, there are few examples of such outsourcing by the public sector and even fewer at the municipal government level.

5C. Study Focus

The consultant will conduct in-depth research and analysis of the 311 Toronto Division in order to:

- Identify 311 Toronto service and program delivery activities that could provide opportunities for outsourcing and/or internal operating efficiencies; and
- Provide a thorough, comprehensive set of data, including cost/financial, legal, quality control, and management considerations, to the City for its use in issuing any future competitive call to the marketplace respecting the outsourcing of 311 Toronto functions/activities.

The focus of this study is to deliver the Services required in this Statement of Work (in part 3(B) above) for the broad purpose outlined immediately above. The following areas have been identified for detailed review and analysis:

- Review other Jurisdictions;
- Current State Assessment; and
- Future State Considerations.

Part A – Review Other Jurisdictions and Leading Practices

The consultant will identify other large public and private sector organizations that have successfully outsourced their contact centre services. The consultant will highlight leading practices and lessons learned, and will also review and report on outcomes and success factors related to outsourcing contact centres with similar services to 311 Toronto.

The review will include but not be limited to:

- Identifying leading practices, outcomes, and lessons learned related to outsourcing all or parts of a customer-facing Contact Centre operation in large (both Private and Public) organizations;
- Identifying and assessing methods of establishing standards for performances measures, methods for monitoring performance, and methods for measuring, monitoring, and ensuring adherence to standards, performance and customer satisfaction, in both a directly-operated municipal Contact Centre, and in an outsourced Contact Centre operation; and
- Identifying and assessing current trends and directions for outsourcing municipal contact centres in terms of the drivers of customer satisfaction [per the *Citizens First* findings] and performance efficiency.

Part B – Assess Current State of Service Delivery

The consultant will document and assess the current state and cost-drivers of the City's 311 Contact Centre by reviewing the current operations, service standards, and performance levels and targets. The assessment shall include:

- A review of the Contact Centre's service delivery across each service channel, including insight regarding the low current use of the online self-serve channel capacity for requests for information and services (only 2%);
- An assessment of the current service standards, service levels, service and performance targets and monitoring practices of each channel and whether these meet, exceed, or fall below industry best practices;
- A review and assessment of the customer experience on each channel;
- Consider and integrate as pertinent, survey results of customer satisfaction on each channel (research conducted will be provided by the City);
- Call Metrics Reports (wait times, handle times, hold times, agent performance data, any issues related to information requests and service request receipt by Contact Centre and conveyance to service Division, etc.);
- Staffing costs and staffing levels;
- Current Call Centre Operations (approach to staffing, training, retention/turnover, workplace culture, shift work, staff relations, staff to management ratio);
- Business processes used to deliver service on behalf of other City divisions;
- Technology in use or planned that supports the Contact Centre operations; and
- Full costs of service delivery.

Part C – Propose Future State Considerations

Based on the findings from Part A and B, the consultant will:

- Provide analysis and options to allow the City to proceed further in its consideration of 311 Toronto outsourcing (i.e. provision of a comprehensive set of data, including cost/financial, legal, quality control, and management considerations, required to issue a thorough competitive call to the marketplace respecting the outsourcing of 311 Toronto functions/activities);

- Identify 311 operational areas/programs for potential operational efficiencies and customer satisfaction through outsourcing the Contact Centre services and provide options for implementation;
- Identify a range of options that achieve cost savings and improve efficiency in the delivery of customer service, including full outsourcing of the 311 Contact Centre operations, partial outsourcing of any component parts of the operations, and on and off-site customer delivery, to include identification of management approaches that are viable for City consideration, for example:
 - Continued direct delivery of a service, function in-house;
 - Public-public partnerships;
 - Public-private partnerships
 - Public-nonprofit partnerships;
 - Granting licensing rights to an organization; and/or
 - Privatization (i.e., divestment);
- Identify considerations for the City based on an assessment of the type of organization most suitable to deliver a 311 service, function, or product including, for example:
 - Cooperatives;
 - Voluntary organizations;
 - For-profit firms;
 - Not-for-profit organizations;
 - Other governments; and
 - Combinations of some of the above;
- Provide an assessment of each option addressing implementation issues and strategies, contract type and considerations, and a costing model for each. Examples to be included in the assessment are:
 - Key model attributes such as organizational structure;
 - Projected cost savings in 2013 and beyond; and
 - Risks and limitations;
- Propose performance and service targets for an outsourced Contact Centre;
- Provide information, criteria and options (e.g. recommended categories for evaluation) to allow the City to establish a competitive call process that meets the City's needs and captures the ingredients essential to a successful and transparent review, evaluation and decision making process of submissions; and
- Provide meaningful criteria to use to evaluate performance of contractors and quality of service delivered.

Related City of Toronto Studies

The City has or will be undertaking studies and reviews (for example, the Shared Service Review and the Cross-Divisional City Counter Services studies both underway) that may intersect with this Service Efficiency Study. The consultant should be aware of the areas of shared interest and communicate through the Project Manager wherever there is a potential for overlap.

6. Project Management

The external Management Consultant will report to the City Manager through the Strategic and Corporate Policy Division. The City Manager's designates and key project contacts are:

SES Project Manager:

Patricia MacDonell
311 Toronto Division
Metro Hall, 55 John Street
3rd Floor, Room 307
Toronto, Ontario M5V 3C6
Phone: 416-392-8591
E-mail: pmacdone@toronto.ca

City Manager's Office Corporate Liaison:

Laurie McQueen
Strategic and Corporate Policy Division
City Manager's Office
10th Floor, East Tower, City Hall
100 Queen Street West
Toronto, Ontario M5H 2N2
Phone: 416-392-8895
E-mail: lmcqueen@toronto.ca

7. Attachments and Information

Respondents are reminded to refer to the original REOI and Addenda, especially Appendix B, Terms and Conditions. Additional information to assist with Responses to this Statement of Work is:

- A. 311 Toronto Span of Control Organizational Chart, May 2012 – [Attachment A](#)
- B. 311 Toronto Division Program map – [Attachment B](#)

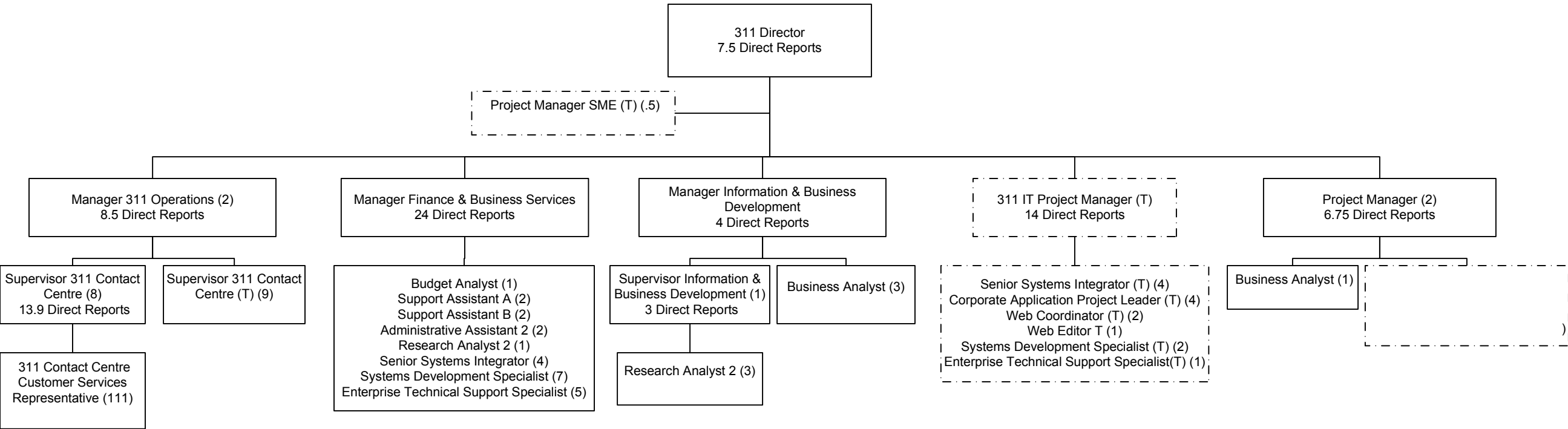
- C. 311 Toronto Customer Service Strategy Report, 2004 – [Attachment C](#)
- D. Report from the City Manager on the Update on the Core Service Review and Service Efficiency Studies (January 6, 2012) – Refer to link:
<http://www.toronto.ca/legdocs/mmis/2012/ex/bgrd/backgroundfile-44209.pdf>

Appendix A to Item BU21.1 - Status of Council Decision on the Core Service Review (January 6, 2012) – Refer to link:
<http://www.toronto.ca/legdocs/mmis/2012/ex/bgrd/backgroundfile-44210.pdf>

Appendix B to Item BU21.1 - Status of the Service Efficiency Study Program (January 6, 2012) – Refer to link:
<http://www.toronto.ca/legdocs/mmis/2012/ex/bgrd/backgroundfile-44211.pdf>
- E. Profiles of City Programs, Agencies and Corporations (as contained in Council Briefing Book, Volume 2) – Refer to [PDF document attached to the e-mail](#) inviting your firm to respond to this SOW.
- F. Budget Information – Refer to link:
http://www.toronto.ca/budget2012/pdf/op12_an_311.pdf
- G. Audit Report on 311 Toronto Customer Service – Refer to link:
<http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2011.AU5.2>
- H. 311 Toronto Online Services – Refer to link:
<http://www.toronto.ca/311/>
- I. Results of 311 Customer Satisfaction Survey, January 2012, Ipsos-Reid (Report to Govt Management Committee, October 2012) - Refer to link:
<http://www.toronto.ca/legdocs/mmis/2012/gm/bgrd/backgroundfile-51134.pdf>

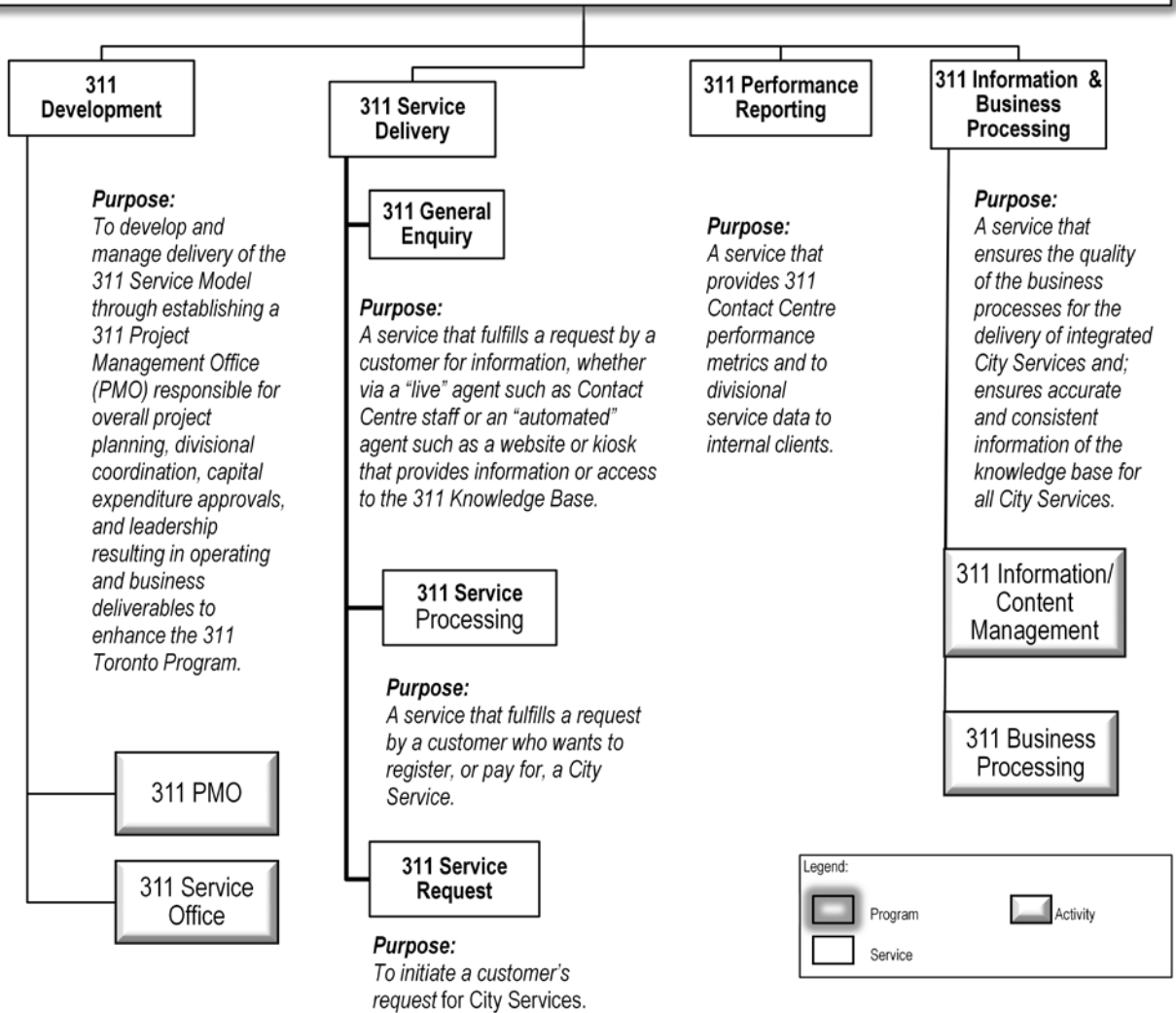
311 Toronto May 1st 2012

	Permanent/ Full-time	Permanent/ Part-time	Temp/Seasonal/ Casual Full-time	Temp/Seasonal/ Casual Part-time	Total
Executive & Senior Management					
Management w ith direct reports	16.00		1.00		17.00
Management w without direct reports	9.00		16.00		25.00
Exempt Professional & Clerical	2.00				2.00
Clerical/Technical	131.00		11.00		142.00
Hourly/Operations					
Students/Recreation Workers					
Total	158.00		28.00		186.00



311

The mission of the 311 Program will be to ensure a single-point-of-access to non-emergency City of Toronto program and service inquiries for all residents, businesses and visitors, in order to provide convenient, prompt, accurate and reliable City government information and requests for service to the public, while making the best use of staff expertise, resources and technology.



- | | |
|--|---|
| 311 Development
<ul style="list-style-type: none"> • City Divisions | 311 Service Request
<ul style="list-style-type: none"> • Contact Customer |
| 311 General Enquiry
<ul style="list-style-type: none"> • Contact Customer | 311 Service Processing
<ul style="list-style-type: none"> • Contact Customer |

- 311 Performance Reporting**
- Council
 - City Manager
 - City Divisions
 - Toronto Water
 - Solid Waste Management
 - Transportation Services
 - Municipal Licensing and Standards
 - Urban Forestry

- 311 Information & Business Processing**
- City Divisions
 - Federal
 - Provincial
 - Special Purpose Bodies
 - Not-for-Profit / NGOs

Consolidated Clause in Administration Committee Report 6, which was considered by City Council on September 28, 29, 30 and October 1, 2004.

12

"3-1-1" Customer Service Strategy Report (All Wards)

City Council on September 28, 29, 30 and October 1, 2004, adopted this Clause without amendment.

The Administration Committee recommends that Council:

- (1) **adopt the recommendations of the e-City Committee contained in the communication (July 9, 2004), from the e-City Committee subject to amending Recommendation (1) by including, in Recommendation (2) of the report (June 23, 2004) from the Chief Administrative Officer, the words “in principle”, so that the recommendations now read that:**

“(1) City Council adopt the staff recommendations in the Recommendations Section of the report (June 23, 2004) from the Chief Administrative Officer, subject to:

- (a) **amending Section 4(ix) of Appendix “C” by adding the words “and Councillors’ staff be provided with the ability to know the source of service requests in their ward;”, so as to read:**

“4. (ix) The public and staff are able to look up and track the status of service requests electronically, and Councillors’ staff be provided with the ability to know the source of service requests in their ward;”

- (b) **amending Recommendation (3) by adding the words “and the projected expected benefits” after the words “associated costs”;**

so that the report’s recommendations now read:

“It is recommended that:

- (1) **the multi-channel, customer service strategy outlined in Appendix “C” of this report, as amended by Recommendation (1)(a), be adopted;**

- (2) Council endorse in principle the strategy success factors outlined in Appendix “D” of this report;
 - (3) the Chief Administrative Officer in conjunction with the Commissioners report back to Council on a phased-in implementation plan that addresses the strategy success factors outlined in this report and associated costs and the projected expected benefits to be included in the 2005 budget submission by October 2004; and
 - (4) the appropriate City Officials be authorized and directed to take the necessary action to give effect thereto.”
- (2) the Chief Administrative Officer be requested to include in her implementation report to be submitted to City Council for its October 26, 2004 meeting, the following:
 - (a) implementation of a technology interface with Members of Council to track information available as part of the three pilot projects to streamline and improve contact centre processes for the public through new technology solutions;
 - (b) as part of the Phase I implementation, a process for coordinating with neighbouring municipalities the 3-1-1- brand and service delivery; and
 - (c) a recommendation that the membership of the Steering Committee be expanded to include the Mayor, or his designate;
- (3) the Commissioner of Corporate Services be requested to report to the e-City Committee on:
 - (a) the potential for back office security business opportunities for the City in support of 3-1-1; and
 - (b) the implications of the Municipal Freedom of Information and the Protection of Privacy Act as it relates to the access of 3-1-1 stream;
- (2) adopt the following staff recommendations in the Recommendations Section of the report (August 16, 2004) from the Chief Administrative Officer:
 - “(1) Council adopt the Vision and Mission Statements for the “3-1-1” Customer Service Strategy as contained in this report; and
 - (2) the appropriate City Officials be authorized and directed to take the necessary action to give effect thereto.”

The Administration Committee submits the communication (July 9, 2004) from the e-City Committee.

Recommendation:

The e-City Committee recommended to the Administration Committee that:

- (1) City Council adopt the staff recommendations in the Recommendations Section of the report (June 23, 2004) from the Chief Administrative Officer, subject to:
 - (a) amending Section 4(ix) of Appendix “C” by adding the words “and Councillors’ staff be provided with the ability to know the source of service requests in their ward;”, so as to read:

“4. (ix) The public and staff are able to look up and track the status of service requests electronically, and Councillors’ staff be provided with the ability to know the source of service requests in their ward; “
 - (b) amending Recommendation (3) by adding the words “and the projected expected benefits” after the words “associated costs”;

so that the report’s recommendations now read:

“It is recommended that:

- (1) the multi-channel, customer service strategy outlined in Appendix “C” of this report, as amended by Recommendation (1)(a), be adopted;
 - (2) Council endorse the strategy success factors outlined in Appendix “D” of this report;
 - (3) the Chief Administrative Officer in conjunction with the Commissioners report back to Council on a phased-in implementation plan that addresses the strategy success factors outlined in this report and associated costs and the projected expected benefits to be included in the 2005 budget submission by October 2004; and
 - (4) the appropriate City Officials be authorized and directed to take the necessary action to give effect thereto.”
- (2) the Chief Administrative Officer be requested to include in her implementation report to be submitted to City Council for its October 26, 2004 meeting, the following:
 - (a) implementation of a technology interface with Members of Council to track information available as part of the three pilot projects to streamline and improve contact centre processes for the public through new technology solutions;
 - (b) as part of the Phase I implementation, a process for coordinating with neighbouring municipalities the 3-1-1- brand and service delivery; and

- (c) a recommendation that the membership of the Steering Committee be expanded to include the Mayor, or his designate;
- (3) the Commissioner of Corporate Services be requested to report to the e-City Committee on:
- (a) the potential for back office security business opportunities for the City in support of 3-1-1; and
 - (b) the implications of the Municipal Freedom of Information and the Protection of Privacy Act as it relates to the access of 3-1-1 stream.

Action taken by the Committee

The e-City Committee:

- (1) requested the Chief Administrative Officer to report to the September 8, 2004 meeting of the Administration Committee with suggested revised wording for the vision and mission statement contained in her report (June 23, 2004) to place greater emphasis on the public and services to be received; and
- (2) requested the Commissioner of Corporate Services to brief the e-City Committee on the benefits of the integration of the technology end of lease strategy as it relates to the implementation of 3-1-1.

Background:

The e-City Committee on July 7, 2004, considered a report (June 23, 2004) from the Chief Administrative Officer recommending a strategy to implement a new, multi-channel, "3-1-1" model of customer service.

Recommendations:

It is recommended that:

- (1) the multi-channel, customer service strategy outlined in Appendix "C" of this report be adopted;
- (2) Council endorse the strategy success factors outlined in Appendix "D" of this report;
- (3) the Chief Administrative Officer in conjunction with the Commissioners report back to Council on a phased-in implementation plan that addresses the strategy success factors outlined in this report and associated costs to be included in the 2005 budget submission by October 2004; and
- (4) the appropriate City Officials be authorized and directed to take the necessary action to give effect thereto.

Shirley Hoy, Chief Administrative Officer, and Colleen Bell, Manager, Corporate Client Services Initiative, Chief Administrative Officer's Office gave a PowerPoint presentation on the 3-1-1 strategy.

(Report dated June 23, 2004 from the Chief Administrative Officer
addressed to the e-City Committee)

Purpose:

The purpose of this report is to recommend a strategy to implement a new, multi - channel, "3-1-1" model of customer service.

Financial Implications and Impact Statement:

Funding in the amount of \$2.725 million for the pilot projects described in this report has been provided in the 2004 Capital Budgets of the Information and Technology Division, Public Health, Works and Emergency Services and Finance Department. There are no operating impacts that result from these pilot projects in 2004.

Additional capital funding will be required in 2005 and beyond. In addition, there will be future impacts on the City's 2005 and subsequent years' Operating Budgets. The costs associated with the phased-in implementation plan will be included in a report back to City Council on or before October 2004. The additional costs will be considered during the 2005 capital and operating budget processes. The Chief Financial Officer and Treasurer has reviewed this report and concurs with the financial impact statement.

Recommendations:

It is recommended that:

- (1) the multi-channel, customer service strategy outlined in Appendix "C" of this report be adopted;
- (2) Council endorse the strategy success factors outlined in Appendix "D" of this report;
- (3) the Chief Administrative Officer in conjunction with the Commissioners report back to Council on a phased-in implementation plan that addresses the strategy success factors outlined in this report and associated costs to be included in the 2005 budget submission by October 2004; and
- (4) the appropriate City Officials be authorized and directed to take the necessary action to give effect thereto.

Background:

In November 1999, Council approved the first phase of the Strategic Plan that defined the vision, mission and goals for the City of Toronto. Service excellence was identified as a critical City

goal. The definition of service excellence for the City was as follows: “Public services are high quality, well-coordinated and easy to access”. In August 2000, Council adopted a series of City directions to support service excellence in the second phase of the Strategic Plan:

- “(o) Deliver high quality public services:
- evaluate City services to ensure they are effective, efficient and relevant;
 - make “service” the motto and establish standards of excellence and service levels in all City programs;
 - establish a “no wrong door” policy for coordinated public access to City services and information;
 - enhance the environmental performance of City operations; and
 - nurture innovation and best practices.”

The corporate Customer Service Improvement project team led by the CAO’s Office was formed with full departmental representation in September 2001 to build on these City directions. A number of pilot projects have been successfully launched to further the City’s goal of “no wrong door” service: eParking Permits, eParks Registrations, interdepartmental staff exchanges between four departmental call centre operations, emergency planning protocol for all call centres and a consolidated counter project at York Civic Centre supported by cross-trained staff. These projects have helped to build the prerequisite foundation to develop a strong “3-1-1” customer service strategy.

At its meeting of October 29, 30 and 31, 2002, Council adopted Clause 29 embodied in Report No. 13 of the Administration Committee. Draft eService objectives were endorsed as outlined in the report entitled “eCity - Building an Information and Technology Vision for Toronto”:

- work with the CAO’s Office to create integrated call centre support;
- report on 3-1-1 non-emergency phone service by the end of 2003; and
- continue to support the Community Information Toronto (CIT) 211 Initiative.

At the meeting of March 4, 2003, the Information and Technology Sub-Committee “requested the Executive Director of Information and Technology to report back to the April 10, 2003, meeting of the Information and Technology Sub-Committee on the progress of the CRTC application regarding 311 services; and, if the application has not been filed by then, staff advise the Information and Technology Sub-Committee on what action can be taken to expedite the application, with a start date of July 1, 2004, established for 311 Services”.

In response to Council directives, staff began work on the following three areas as prerequisite “building blocks” to support a new “3-1-1” customer service initiative:

- submission of a national application to the Canadian Telecommunications and Radio-Television Commission (CRTC) to request the designation of the telephone number 3-1-1 for non-emergency, municipal services;
- recommend a vision and customer service strategy to support an integrated call centre model for consideration by Council; and

- develop common standards based upon interdepartmental business requirements for all future acquisitions of call centre technology.

At its meeting held on July 22, 23 and 24, 2003, Council adopted Clause 22 embodied in Report No. 7 of the Administration Committee, entitled "Report on the CRTC Application to Designate 3-1-1 for Non-Emergency Municipal Government Services" authorizing the City to become a joint "3-1-1" applicant. A formal application was submitted to the CRTC on October 31, 2003 on behalf of the City of Toronto, City of Calgary, Halifax Regional Municipality, Ville of Gatineau and Regional Municipality of Halton. A preliminary consultation with all telecommunication carriers and the co-applicants was completed on January 30, 2004. The application remains under review by the Commission.

An interdepartmental design team began work in May 2003 to develop the customer service vision for an integrated call centre strategy for the City of Toronto. This report outlines the staff recommendations arising from this design consultation. All major customer service teams, Corporate Information and Technology, Corporate Communications, Social Development and the 2-1-1 Community Information Toronto representatives participated in the consultation.

The process to develop common contact centre technology standards and a companion technology strategy for the City of Toronto was initiated in March 2004. \$145,000 was previously approved in the 2003 Corporate Information and Technology capital budget submission to hire external consultants to undertake this work. The successful proponents were Innovative Virtual Solutions Inc. This process has been divided into three parts.

During Part 1, an environmental scan was conducted to assess current processes, existing applications and business requirements; and identify potential opportunities for service improvement that could be enabled through new technology solutions. The Corporate Information and Technology team completed an extensive consultation with all contact centre operations, business teams who had identified future contact centre initiatives in their strategic plans and all technical support teams by the end of May 2004. The participating teams were Access Toronto, Revenue Services- Tax and Water and Parking Tags, EDCT Administration and Support Services, City Clerk's – Legislative Services, UDS Buildings Division, UDS Municipal Licensing and Standards Division, WES Customer Service, Toronto Public Health, Social Services, Facilities and Real Estate – Customer Service, Court Services, Corporate Security, Corporate Communications - Creative Services, Corporate Information and Technology-Computer Operations & Telecommunications Services and Productivity and Support Services and all departmental Information and Technology teams. All business requirements, legislative restrictions, inventories of existing applications and future strategic plans have been compiled and analyzed to develop a corporate profile of operational needs and identify potential opportunities for service improvement that could be enabled through technology. Part 2 will be completed by July 2004. During this phase, the consultants will research and report on the following:

- development of business cases supporting possible service improvements that are enabled by new technology;
- the features, applications, capability for size or scope to be changed for all the "best-of-breed" manufacturers;

- an analysis of all “best-of-breed” scripting applications that would provide staff with prescribed answers to the public and potential integration issues with “back of house” applications to be considered as part of any implementation;
- an assessment of the City’s existing systems and a comparison of their functionality and performance against industry best practices;
- An assessment of existing call centre operations and their operational challenges to be considered in the implementation of these proposed technology solutions for service improvement; and
- recommended implementation strategy for new technologies that will support the City of Toronto’s new customer service strategy.

In Part 3, a corporate Request for Proposal (RFP) will be developed to acquire the appropriate technology solutions to support the first stage of implementation of the new customer service strategy. The RFP is scheduled to be issued in early fall 2004. Funds in the amount of \$2.725 million for three department pilot projects were approved in the City’s 2004 Capital Budget. Funds for the supporting infrastructure have been provided in the Information & Technology’s 2004 Capital Budget, in the amount of \$.979 million. The Capital Programs for Works and Emergency Services, Public Health and Finance include \$.976 million, \$.320 million and \$.450 million respectively for the purchase of new telephony solutions for contact centre operations and other related systems applications.

During the “3-1-1” implementation period, the City will also be upgrading desktop PCs, servers, storage networks, etc. through the Technology End of Lease Project (TELS). This project funding was approved in the 2004 budget and is to replace all of the current City assets that are under lease with MFP Financial Services. This project will not be funding “3-1-1” related technology acquisitions as it is a separate, but concurrent project. The “3-1-1” delivery team will, however, be receiving upgraded desktop PCs as a result of the TELS implementation.

Comments

The vision and “3-1-1” customer service strategy and the critical success factors outlined in this report have been recommended by the design and technology teams.

1.0 Public Expectations of Government Services

The recommended “3-1-1” customer service strategy for the City of Toronto is based upon service improvement recommendations arising from the *Citizens First*, *Citizens First 2000* and *Citizens First 3* reports and feedback from City of Toronto citizens. *Citizens First* is a research initiative of the Citizen-Centered Service Network (CCSN) which includes service quality leaders brought together by the Canadian Centre for Management Development. These reports are based upon the results of national surveys conducted by Erin Research Inc. on a biennial basis. The City of Toronto was one of three host sites in 2000 and 2002. The original *Citizens*

First report in 1998 identified five critical drivers of satisfaction that most strongly influence the public's perceptions of service delivery. The five "drivers of satisfaction" in order of greatest significance were:

- timeliness;
- knowledge and competence;
- staff courtesy/went the extra mile;
- fairness; and
- outcome.

The reports analyzed customer satisfaction across all of the service channels: telephone, in person, Internet, e-mail, fax and mail. All three reports identified the telephone as the preferred channel of service delivery for the public. However, the survey results also indicated that it is the channel consistently receiving the lowest rating of service satisfaction. The public continues to experience problems with directory listings, busy telephone lines, difficulties with voicemail and multiple transfers.

2.0 The Need for a New Customer Service Strategy

The City of Toronto serves a population of over 2.5 million people. The municipality has forty four wards. The City provides service to the public through six departments with 27,000 employees. Approximately 2,700 City staff provide "first point of inquiry" responses to the public on the telephone, over the counter, by e-mail, fax or mail as part of their regular duties. Web visitor sessions exceed 250,000 sessions per week. 45,000 people visit City counter locations on a weekly basis. The City processes approximately 170,000 calls a week through formal call centre operations and integrated counter/telephone teams.

There has already been extensive consolidation of services within the City's call centre teams since amalgamation. The City of Toronto currently has nine contact centre operations at twenty-six locations. All nine operations act as a co-ordinated "gateway" to City services via the telephone. Access Toronto provides general City information on a corporate-wide basis. The Social Services call centre functions as an intake and assessment unit for individuals seeking social assistance. The remaining seven call centres are organized along departmental lines and process specialized information requests and specific service transactions: Facilities and Real Estate Customer Service, Court Services, EDCT Administration and Support, WES Customer Service, Public Health, Tax and Water, and Parking Tags. WES Customer Service operates the largest call centre operation in the City. There are 229 approved City staff positions dedicated to support customer service transactions in call centre environments (229 FTE positions excluding Social Services).

Many of the City's customer service processes represent pre-amalgamation practices, are not harmonized and are still manual in nature. While there are individual program standards and performance measurements (e.g. Social Services) there are no corporately harmonized service standards for customer service transactions. At present, there is also limited capability for customer service teams to electronically track service outcomes on behalf of the public on an efficient electronic basis. While *Citizens First 3* reported the important conclusion that "service quality shapes the public's confidence in government", not all City processes are organized to easily measure and evaluate service quality in a consistent manner.

3.0 The American “3-1-1” Service Experience

On July 23, 1996, the US Department of Justice made a request to the Federal Communication Commission (FCC) to reserve the number 3-1-1 for national, non-emergency services. In February 1997, the FCC approved 3-1-1 for this exclusive use. The City of Chicago was the first municipality to successfully implement a 3-1-1 service for its citizens in late 1998. At present, seven of the ten largest American cities have implemented a “3-1-1” customer service strategy to better serve their constituents. As the three largest municipalities, New York, Los Angeles, and Chicago have all identified positive service improvements through a citizen-centric service model. All three municipalities approached their “3-1-1” service implementation as an opportunity to transform their service culture, processes and relationship with their citizens.

The following benefits and achievements have been realized through “3-1-1” service implementations in American municipalities:

- ease of access to public services was improved through one easily remembered number;
- consistent, integrated service delivery across all access channels for the public;
- internal capacity to track service requests and complaints to the point of resolution;
- improved the appropriate allocation of internal resources to address problems;
- enhanced citizen engagement; and
- “3-1-1” service delivery was recognized as a municipal brand of excellence.

Appendix “B” provides a comparison of four American 3-1-1 municipalities, their costs and critical information.

4.0 The “3-1-1” Customer Service Strategy

The elements of the “3-1-1” strategy include a vision statement, mission statement, strategic goals, citizen-centered model of service delivery, multi-channel approach to service design and delivery, enhanced City image, service menu, 3-1-1 service coordination with 9-1-1 and 2-1-1 services, 3-1-1 role within the City’s emergency plan, and service collaboration with other levels of government.

The “3-1-1” customer service vision and strategy represents a transformation of the City’s service culture, process design, and operational requirements from traditional, operationally driven processes to a citizen-centric model of delivery. Services and processes are designed and organized from the perspective of the citizen. Routine service inquiries and transactions will be processed at the first point of contact. Citizens are able to access services and transactions on their channel of choice; telephone, Internet, in person, e-mail, fax, or mail. Service quality management will be consistent across all service channels. It is recommended that Council adopt the following vision statement, mission statement and strategic goals outlined below.

4.1 “3-1-1” Vision and Mission Statements, Strategic Goals

The vision, mission statements and strategic goals were developed collaboratively by an interdepartmental team representing every major customer service area, Corporate Information and Technology, Corporate Communications-Creative Services, Social Development and 2-1-1-Community Information Toronto. The vision statement for the “3-1-1” customer service strategy is:

“3-1-1 opens the door to the City. Everyone will experience excellent service from the Toronto Public Service, a recognized and proud deliverer of 3-1-1”.

The “3-1-1” mission statement is as follows:

“The Toronto Public Service provides 3-1-1 ‘services that are high quality, well-coordinated and easy to access’ to the public, with respect, professionalism and integrity”.

The “3-1-1” strategic goals are:

- to be responsive and effective in meeting the changing and diverse needs of our community and the people we serve;
- to effect a service transformation to a citizen-centric model of service delivery for the City;
- to provide “3-1-1” services in a multiple channel model;
- to train and motivate the “3-1-1” team and develop effective cooperation and communication with all internal/external partners;
- to strategically use knowledge, expertise, resources and technology to support “3-1-1” services;
- to provide a supportive environment that fosters continued service innovation at all levels in the City’s organization; and
- to be recognized by the public as an exceptional provider of “3-1-1” services.

4.2 Citizen-centered Service Model

City services have been designed in a traditional, operationally driven model of service delivery. Each operation is responsible for the management and evaluation of its own customer service processes and outcomes. Processes are not currently evaluated within the broader context of a full customer service experience. For instance, if a customer is transferred to another team for further service, the “first point of contact” team may not know if the service transaction was completed successfully.

A citizen-centered “3-1-1” service design looks at the delivery of the whole service experience for the public from the first point of initial contact to the completion of the service transaction. Services are designed from the perspective of the citizen to ensure accessibility and ease of use.

A “no wrong door” approach eliminates the need for the citizen to know how City services are organized. Customer service staff take responsibility for service navigation on behalf of the citizen.

The proposed “3-1-1” customer service strategy takes the concept of service quality management one step further by building in consistent quality, tracking and accountability measurements throughout the service experience. All teams contributing to “3-1-1” service delivery will be required to provide a consistent level of service quality. The “3-1-1” operational team will be able to track the status and completion of a service request electronically on behalf of the public. This tracking process is particularly beneficial for the citizen when a service transaction can only be completed through multiple contacts (e.g., interdepartmental involvement). This report recommends that a citizen-centric model of “3-1-1” service delivery be adopted that supports services designed from the perspective of the public and enhances service quality and accountability throughout “3-1-1” service processes.

4.3 A Multi-Channel Approach to “3-1-1” Service Delivery

Citizens can currently access City services over the telephone, on the Web site, by e-mail, mail, fax or in person. The Citizens First 3 report identified that citizens use two or more channels in approximately 50% of all attempts to obtain government services. The “3-1-1” customer service strategy recommends seamless, consistent service delivery across all channels to allow for personal choice, a combined menu of staff-supported services and self-serve options and 24/7 accessibility through the development of the following initiatives:

- one consolidated “3-1-1” call centre operation to manage the recommended service menu outlined in this report;
- smaller “3-1-1” specialized teams to manage transfer requests requiring technical expertise, appropriate management of information privacy/confidentiality;
- “3-1-1” service portal on the City’s Web site designed to allow citizens to conduct service transactions on-line on a 24/7 basis;
- “3-1-1” service kiosks placed in prominent public locations for ease of access;
and
- “3-1-1” counter teams who provide the same menu of services for “in person” requests.

4.4 The Public Image of the “3-1-1 Service Strategy”

The City’s image will be greatly enhanced by the provision of “3-1-1” service delivery with the adoption of the following design features:

- 3-1-1 will be the one published City telephone number for staff supported services excluding Members of Council information;
- telephone numbers for “3-1-1 self-serve” services will also be published;
- one published City e-mail address;

- inquiries to the “3-1-1” contact centre operation are answered by staff on a 24/7 basis;
- there will be an easily accessed, well-designed “3-1-1” Web portal that the public can access on a 24/7 basis;
- requests are answered in a timely manner regardless of the service channel;
- information provided on all “3-1-1” channels is consistent, accurate and up to date;
- self-serve options on the telephone/Web site/ at the counter are easy to access and are user friendly;
- the public and staff are able to look up and track the status of service requests electronically;
- all staff-assisted “3-1-1” requests are handled by well-trained customer service professionals;
- interpretative services are provided in multiple languages over the telephone channel;
- customer requests are resolved at the first point of contact whenever possible;
- all necessary transfers are “warm” to a staff and to the right team every time;
- the public will receive a consolidated “3-1-1” response to requests requiring input from more than one service area; and
- published service standards for expected service outcomes.

4.5 The “3-1-1” Service Menu

The strategy recommends the following categories be deemed as “3-1-1” services:

- all general inquiry information for all City services and activities;
- service requests; and
- public complaints.

The public will be transferred to staff specialists when:

- citizen requested transfer for a specific individual or service;
- the inquiry is of a medical/counselling nature;
- specific technical expertise and/or interpretation is required; and
- there are information privacy/legislative restrictions.

4.6 Service Coordination and Communications for “3-1-1/2-1-1/9-1-1” Teams

The U.S. “3-1-1” experience identifies the importance of coordination of services with other N11 numbers as a critical “lesson learned”. The 9-1-1 emergency response service has been operating successfully on a 24/7 basis in the City of Toronto since March 1982. 9-1-1 services process over one million calls annually.

In 2002, Community Information Toronto introduced the three digit number 2-1-1 to replace their existing ten digit number. Access to service information and referrals are provided to the public on a 24/7 basis for non-emergency situations, primarily in the areas of social services and health. This service acts as a complementary, non-emergency community partner with the existing 9-1-1 services. Public response to 2-1-1 services has been excellent, resulting in 1,476,072 inquiries being processed in 2002. The successes of both 9-1-1 and 2-1-1 services

have proven that the public prefers to use services that have been designed on a “no wrong door” approach with short, easy to remember telephone numbers when requesting assistance.

Co-ordination of services and community communication strategies will support all three N11 services in building overall capacity to better serve the public to increase efficiency and productivity. The 9-1-1 and 2-1-1 teams are service partners on the City of Toronto design team to ensure that potential duplication of services is avoided. This strategy recommends that Council endorse the continued co-ordination of services and public communication strategies between 9-1-1, 2-1-1 and 3-1-1 services to enhance overall service capacity.

4.7 “3-1-1” Service Role within the City’s Emergency Plan

The Access Toronto Unit is currently responsible for establishing a single-number Public Information Call Centre to support overall communications efforts led by the City of Toronto’s Corporate Communications Division and its supporting agencies in the event of a major incident or disaster. Access Toronto in consultation with the Customer Service Improvement Initiative (CSII) has already established formal communication plans and protocols to re-deploy staff from other call centre teams as required. These protocols were used very successfully during the August 2003 blackout. Once the “3-1-1” Service team is fully operational, it will lead the coordination of non-emergency service information on behalf of the City in the event of a major incident or disaster.

5.0 Strategy Success Factors

Extensive research has been conducted by staff to identify “lessons learned” from American municipalities to be incorporated into the City of Toronto implementation plan. The following success factors and recommendations are based upon these critical “lessons learned”.

5.1 Service Capacity Projections

The City of Toronto contact centre operations collectively answer approximately 60% of all “calls offered” on their telephone queues from the public. “Calls offered” refers to each time that an individual attempts to call the number regardless of whether the call is answered or the individual hangs up. Access Toronto and Social Services answer at least 80% of all calls consistently due to sufficient staffing levels. At particular times in the year, service levels in City contact centres occasionally drop as low as 20% due to spikes in call volumes and lack of staffing. These spikes can usually be attributed to inclement weather conditions, power outages or anticipated events such as major registration periods.

American jurisdictions that have successfully implemented a “3-1-1” service have identified the need to plan for high volumes of calls as a critical success factor for successful implementation. In Chicago, the City was so overwhelmed by the dramatic increases in public use, it had to expand its operations shortly after implementation. Cell phone users increased “3-1-1” inquiry traffic dramatically because the number was so easily remembered. Research has shown that the public does not know which level of government is responsible for specific services and will call “3-1-1” for all government information and services. Appropriate forecasting of “3-1-1” call volumes must project a significant percentage of misdirected calls for provincial and federal inquiries as well as municipal calls. American “3-1-1” municipalities consistently recommend

that capacity needs be overestimated in the early stages of implementation. It is critical that the “3-1-1” operation is appropriately staffed to manage the high volume of calls successfully to build early public confidence in the new service.

“3-1-1” municipalities have also identified the need for the capacity to electronically identify duplicate requests. All “3-1-1” jurisdictions have reported receiving multiple calls from different citizens about the same problem. Newscasts or events highlighting high profile issues can drive up call volumes on the same problem even higher. This ability to identify duplicate requests ensures that only one crew is sent out to address a problem and that resources are managed well.

Another challenge is to manage public expectations regarding response times from field operations. The increased accessibility created by an easily remembered telephone number, will result in a significantly higher volume of service order requests than previously experienced. Even with duplicate request identification, the number of overall service orders will actually increase on an annual basis. Depending on the demand, this will overburden the field teams responding to service orders. Service levels may fluctuate until appropriate resource needs can be properly addressed.

This strategy recommends that a plan must be put in place to establish current and proposed service levels and the associated financial impacts for both the “3-1-1” team and field operations. Regular reviews of service levels must be conducted to ensure that appropriate resources are assigned and funded. This plan will be included in the implementation report to be tabled in October 2004.

5.2 Service Level Agreements

The City of New York and City of Los Angeles identified a need for established protocols to address interdepartmental operational decisions that might impact “3-1-1” service delivery. The relationship between their “3-1-1” team and the operational units needed to be formalized. These agreements included a precise inventory of services to be provided by “3-1-1” staff and departmental specialized teams, service levels, roles and responsibilities, resolution process and contract amendment process. These formalized agreements led to departments working more closely together, resulting in improvements in overall efficiency and effectiveness of service delivery to the public. This strategy recommends that the City of Toronto “3-1-1” team and departments enter into formal service level agreements outlining the roles and responsibilities of each party, communication protocols and approved script content.

5.3 Building the “3-1-1” Team, Culture and Organizational Structure

The Cities of New York, Chicago and Los Angeles all designed new organizational structures staffed with existing employees from various teams to build a new service culture to support “3-1-1” services. As service capacity increased, the staff establishment was supplemented by new employees as required. The City of Toronto is adopting their best practice and will be examining the creation of a new “3-1-1” customer service division within the context of the administrative review. The “3-1-1” model must be designed and resourced to ensure consistent, appropriate service levels for the public. This City operation must be able to support a large customer service team, quality assurance/information management staff, ongoing training, administrative support functions and have systemic operational efficiencies. The structure must

also be able to sustain a service culture that is customer-centric in nature and focused on excellence in service quality. It is recommended that a centralized team model be considered to support effective team-building, efficient workforce management, strong quality assurance, on-site management at all times and effective information dissemination.

“3-1-1” job profiles must reflect critical customer service skills and qualifications. An extensive consultation with the City of Toronto customer service teams and Human Resources has already taken place in 2003, and the process for classifying new customer service positions has been considered. Human Resources staff will be working closely with CUPE Locals 79 and 416 to resolve the harmonization of existing positions and to develop new positions for the “3-1-1” team by spring 2005. Any financial impact arising from the classification of such positions will be reported in the implementation plan to Council in October 2004. There must also be emphasis placed on positive employee satisfaction, career opportunities and ongoing training opportunities for staff to enhance their skills. The intent is to foster a strong commitment to excellence in customer service and reduce turnover rates. The human resource management strategy to build the new “3-1-1” service team will be developed in full consultation with CUPE Locals 79 and 416.

5.4 Training and Development

Both the City of Chicago and City of New York “3-1-1” teams identified training as a critical success factor in implementation. Both municipalities have developed intensive, mandatory training programs to develop the appropriate level of technical and customer service skills on their staff. The City of Austin also recognized the importance of staff embracing and fully understanding the “3-1-1” service strategy. The City of Austin recommended a combination of classroom, hands-on experience and formal coaching as the most effective training plan. Most “3-1-1” training programs focus on three areas: government information, technical knowledge and customer service. These training programs are usually a minimum of four to six weeks in length.

The City of Los Angeles also conducted skill assessments with both “3-1-1” employees and departmental staff who would be providing service on a “3-1-1” transfer call. These assessments indicated that most of the departmental staff answering transfer calls had little or no customer service training. Departmental staff supporting transfer calls from “3-1-1” were required to upgrade their customer service skills to the same professional level as the “3-1-1” team. The municipality wanted to ensure that the quality of the service experience was consistent for the customer, regardless of the number of staff involved.

The City of Toronto strategy recommends a formalized “3-1-1” training program comprised of an intensive skill assessment process, in-class instruction and on-site coaching to support excellence in service. All staff who deliver all or part of the “3-1-1” service experience to the public would be required to complete all mandatory training requirements. The training program will be tailored to meet the needs of both existing employees and future staff. Continuous investment in education and skills upgrading will be critical to the long-term success of the operation.

5.5 Policies and Procedures, Service Standards and Performance Measurements

Strong service quality management will be driven in part by consistent policies, procedures and performance standards across all channels of access. The public will find the City easier to understand when there are harmonized processes in place. The Customer Service Improvement Initiative (CSII) policy team has been developing draft policies and standards for all service channels. The framework includes: a standard set of corporate definitions and policies; citizen-centered service standards; quality assurance standards, one complaint protocol, standardized call documentation and reporting formats, and multi-lingual and access and privacy guidelines. These proposed standards are scheduled to be tabled internally in the fourth quarter of 2004. Pilots to test the proposed e-mail response standards are currently being hosted in WES Customer Service and the CNS Public Health Connection Contact Centre. Revenue Services also hosted a test pilot for response standards for the mail channel in April/May 2003 and found that the proposed standard was achievable within a very high volume operation. This strategy recommends that all relevant policies, procedures and service standards be harmonized for all teams contributing to the delivery of “3-1-1” services.

5.6 Streamlined Services for Improved Quality and Efficiency

At present, the City is operating with a combined menu of harmonized and unharmonized services with varying degrees of automation. All identified “3-1-1” service processes will undergo a business process review to enhance consistency. The purpose is to build in timely responses at all stages for the customer; determine process readiness to be automated where appropriate and migration schedule to the new operational model. This may mean the rethinking and redesigning of existing process tasks and operating structures, where required, to improve overall process management. This process re-engineering will enhance departmental and interdepartmental coordination of service transactions by clarifying roles and shared responsibilities, building capacity to track service requests throughout the entire process, identifying appropriate service levels and resourcing at all stages, and coordinating communication strategies. Staff will be able to measure service quality at all stages of a service process. This strategy recommends that “3-1-1” services undergo a formal business process review and re-engineering before approval to “go live” is determined.

The primary goal of the “3-1-1” customer service strategy for the City of Toronto is the improvement of service delivery and response times. However, the City of Chicago and the City of Baltimore also identified cost efficiencies through the deployment of back-end tracking systems for better field service management. The City of Baltimore reported savings of \$13.2 million in the first year that their field service tracking system was implemented. As an example, they were able to save \$361,000 in overtime costs in their Solid Waste Management Department. At the same time, they were able to generate an additional \$175,000 from citations for illegal dumping. The City of Chicago’s Department of Buildings saved \$600,000 in 2002 by avoiding duplicate “no heat” calls. This strategy recommends that a plan be implemented to establish “efficiency” benchmarks and report out later on any tangible cost savings. The effectiveness of this plan would be contingent upon the acquisition of a sophisticated field management tracking system.

5.7 Consolidation of Internal Inquiry Lines and E-Mail Addresses

“3-1-1” will be the only published telephone number for non-emergency, municipal services for the City of Toronto. However, the strategy recognizes that internal transfers to specialized teams

may be required for certain situations. Currently there are 251 active inquiry lines in use. All departments will need to conduct a review of all their internal inquiry lines and e-mail addresses in existence, the staff resources assigned to support those access channels, response times and response quality. It will be important to ensure that services are not being duplicated on more than one inquiry line. The review will also allow departments an opportunity to consider the provision of additional services over the telephone where appropriate. To ensure that call and e-mail requests can be transferred to the right specialized team every time, departmental consolidations will ensure that those “transfer” teams are properly resourced, trained and meet the same service standards as the “3-1-1” team. This inquiry line consolidation is a prerequisite foundation piece to enhancing service at the “second point of contact”. This strategy recommends that a corporate plan to consolidate internal inquiry lines and e-mail addresses to improve the precision of transfers.

5.8 “3-1-1” Online Customer Service

The “3-1-1” customer service strategy has a very strong emphasis on the provision of online self-serve applications via a customer-centric digital City gateway or portal. The provision of services on-line allows the City to improve and extend its capacity to serve the public in a cost-efficient manner on a new electronic channel. American municipalities have found that the introduction of “3-1-1” on-line services has improved their overall capacity to process inquiries on a 24/7 basis and has been a complementary service to the 3-1-1 staff supported, telephone service. The implementation of on-line services allows municipalities to focus limited staff resources on more complex public inquiries requiring interpretation and specific actions. Ongoing City of Toronto efforts to enhance service quality for the public will benefit from a comprehensive online portal plan for the City that that will support new, interactive, integrated initiatives and high content standards to meet public needs. The plan will include:

- guiding principles;
- one standard set of definitions;
- criteria to identify best practices;
- corporate standards for all information posted on the City’s Web site;
- corporate approval procedures for posting content;
- quality assurance procedures based on customer expectations;
- policy on archived information;
- guidelines on multilingual services;
- guidelines on access and privacy issues; and
- technology and application standards to support future development of transactional, on-line service solutions.

This approach will ensure that the City’s official Web site continues to build on a customer-centric model that is well-designed, with information that is easy to find and accurate. The public will trust electronic self-serve functions that are user friendly, consistent in their design and format and secure.

5.9 Content Management

It will be critical that information provided to the public from all “3-1-1” service channels is consistent, accurate and current. To address this issue, it is recommended that the City consider

a solution that allows staff supporting any channel to access information from one common knowledge base. The public can then be assured of receiving the same accurate and current information irrespective of the “3-1-1” channel used. The City’s Enterprise Content Management project is already in Phase 1 of implementation and preliminary deployment is scheduled for fall 2004 to better support management of information on the City’s website. This report recommends that an enhanced content management strategy be developed to support the effective and coordinated management of the information across all channels.

5.10 Quality Assurance

The Social Service and WES Customer Service call centre operations have already implemented quality programs to enhance service delivery to the public. This strategy recommends that a well-defined quality assurance program also be implemented for “3-1-1” services. The program will be built upon well-defined service quality and performance measurements to evaluate “3-1-1” service experiences for the citizens of the City of Toronto on an ongoing basis. The “3-1-1” program will focus on the five cornerstones of customer satisfaction: timeliness, knowledge and competence, staff courtesy/“went the extra mile”, fairness and outcome.

5.11 Effective Management Tools

The “3-1-1” customer service strategy will require management tools that support ongoing operational efficiencies. Capacity to accurately track and evaluate service quality and outcomes throughout an entire service experience will be key to continuous service improvement. The City of Chicago, City of Baltimore and City of Dallas have all successfully implemented corporate tracking systems to monitor service requests at all stages of the process. Internally, the Social Services call centre has implemented a workforce management system that enables precise, daily service forecasting to identify appropriate service levels and staffing requirements to consistently meet prescribed service standards. This strategy recommends that a plan is developed to acquire and implement electronic management tools to build operational efficiencies and accountability throughout “3-1-1” service processes.

5.12 Information Technology Strategy

A focused technology strategy is being developed by Corporate Information and Technology to build the foundation for a state-of-the-art “3-1-1” customer service experience for citizens. The phased-in implementation of the technology strategy will be based upon the business requirements of the “3-1-1” customer service strategy. The “3-1-1” operational team will be equipped with the necessary tools to answer inquiries utilizing knowledge based systems, ticketing systems including incident status and scripting tools with efficient and accurate search engine capability. Agents will be able to handle inquiries from all different types of technology in the future. Successful “3-1-1” service quality management will require some or all of the following capabilities:

- knowledge base that enables staff to efficiently search and retrieve information;
- scripting functions that enable staff to provide consistent responses to the public and will prescribe when call transfers are required;
- capability to code the type of service calls received to better track reasons for transfers, location of transfer;

- call listening features to support ongoing employee coaching and quality assurance programs;
- electronic overflow strategy to manage unplanned large volumes of calls;
- email management system to improve response times, quality of response, tracking of status
- centralized reporting systems; and
- privacy enhancing functions.

In order to realize true service enhancement, service delivery processes will be reviewed and streamlined wherever possible. Re-engineered service processes can then be further improved with automation. To reach this stage of readiness, significant work to integrate the new technology solutions to existing, backend, operational applications and systems will be required. Current applications may require upgrades or replacement in order to support these newly streamlined processes. Investments already approved will be maximized. The scope of these efforts will be significant and would extend well beyond the standard telecommunications and call centre applications. It is recommended that a strong technology assessment, strategy and cost implications be included in the implementation plan.

5.13 “3-1-1” Business Recovery Plan

The development and implementation of a comprehensive business recovery plan is critical for the “3-1-1” operations. This operation will need to be available on a continuous basis to the public. The “3-1-1” team will be a primary point of contact, information and reassurance to the public in the event of an emerging situation. During the August 2003 blackout in New York City, the “3-1-1” team operated very successfully as a primary, non-emergency service for citizens, allowing the 9-1-1 response teams to focus appropriately on actual emergency situations. A comprehensive business continuity plan will be considered as a critical component of the implementation plan.

5.14 Facility Requirements

The City of Austin and City of Chicago both identified the importance of the physical environment for their 3-1-1 call centre teams. The City of Austin found that the design of their call centre’s physical space had a direct impact on staff morale and the efficiency of their systems operations. The City of Chicago and City of Baltimore experience significant numbers of visitors to their “3-1-1” operations and have had to consider tour arrangements as part of their facility specifications. Locational facility requirements to accommodate the City of Toronto’s “3-1-1” team will be developed once the organizational model is more fully developed. A redundancy site may need to be identified as a contingency measure, should the “3-1-1” team be required to evacuate a primary location. This strategy recommends the development of a facility plan to support the “3-1-1” centralized model.

5.15 Communication Strategy

The communications plan must be comprehensive to promote public and staff awareness and support for the “3-1-1” customer service strategy. It will include a two-pronged strategy for internal and external audiences. The initial phase will involve an internal campaign that will focus on staff, inter-departmental involvement, and Members of Council. City of Austin and

City of Los Angeles identified the importance of staff understanding the “3-1-1” vision for service. They concentrated their internal campaign messages to focus on a clearly articulated need for change, expected benefits, how the model would work and channels for ongoing feedback. The City of Toronto internal campaign will include an internal launch, Intranet site, training workshops, and presentations to staff.

The external campaign will be targeted to residents and businesses in the City of Toronto and will utilize a multi-media approach. The goal of the public communication strategy is to establish the term “3-1-1” as a recognized brand of service excellence in municipal government. American cities have implemented a ‘soft’ communication launch prior to the public inauguration of the service to work out any problems in the start-up stage. The report recommends that a comprehensive communication plan to build internal staff awareness and understanding of the “3-1-1” strategy and an extensive public education campaign to build public recognition of the service.

5.16 Phased Implementation

American “3-1-1” cities have all employed a phased-in approach to implementation to successfully manage the scope of their strategies, build early public confidence in the service and allow for appropriate business process reviews to take place. Almost all of the cities have employed a ‘soft’ launch approach to ensure that systems problems were resolved and that staff became more experienced and at ease in their new functions before an extensive public education strategy took place. All cities have recognized the importance of a positive first impression of “3-1-1” services for their citizens. As an example, the City of Baltimore implemented a “back of house” tracking system in June 2000, the 3-1-1 general inquiry service in March 2002 and on-line “3-1-1” service request option in May 2003. The City of Chicago has implemented new services and features for its 3-1-1 service over a five year period. The City of Toronto will be employing a phased implementation strategy to support the introduction of “3-1-1” services to its citizens as outlined in Section 6.0.

6.0 Next Steps

The implementation plan to be tabled at Council in October 2004, will outline in greater detail, the critical milestones, project plan and schedule and 2005 associated costs for the delivery of the overall strategy.

6.1 Project Management Model

The Steering Committee will be comprised of the Chief Administrative Officer as the project champion, the Executive Management Team (EMT), the Executive Directors of Corporate Information Technology and Human Resources, both CUPE Local 79 and 416 presidents and the corporate lead from the CAO’s Office for “3-1-1” implementation.

The implementation team will be led by the corporate “3-1-1” lead from the CAO’s Office and be comprised of business leads, departmental leads and technical leads. There will also be more specialized business and technical workgroups to address specific aspects of the project requiring specific skills and expertise.

6.2 Phase 1 – Summer 2005

Three pilot projects to streamline and improve contact centre processes for the public through new technology solutions were approved in the 2004 budget estimates. \$2.725 million has been approved to conduct process re-engineering, purchase new telephony solutions for contact centre operations, and middleware applications to facilitate integration between front-end telephony and back-end applications (e.g. field service management systems). These projects will implement new design elements of the “3-1-1” service strategy in summer 2005 in a soft launch approach. All three teams already provide a “no wrong door” approach to coordinated service access for their respective departments and are well-positioned to launch Phase 1.

6.2.1 WES Customer Service

WES Customer Service will implement a pilot project to automate the service order process between the call centre operations and field operations:

- enable customer service staff to use a single “information, intake and status” application for all WES inquiries;
- staff will be able to send service request information directly to the appropriate existing work management (work order) system in either Transportation, Water Wastewater or Solid Waste Management Services;
- staff will be able to track the status of a WES service request on behalf of the customer; and
- information and service levels will be recorded in a knowledge base that has capacity to diagnose problems intuitively; script prescribed responses; capture service request data, prior history by address and the status of service requests regardless of which division is providing the service.

It must be noted that WES is the one of the primary departments processing service order requests. Due to ongoing harmonization of by-laws and processes and high volumes, requests for specific services will be formally sequenced according to their state of readiness for transferral to the “3-1-1” service menu.

6.2.2 Public Health

Public Health will pilot the implementation of new technology to enable better service quality management in a “3-1-1” specialized team environment. The objective of this pilot is to provide customers with a coordinated method for accessing information, services and programs provided by Toronto Public Health and its service partners. Access methods include the telephone, email, fax, TPH Web portal and walk-ins. The following features will be evaluated by Public Health in the pilot phase:

- an enhanced information repository to give staff increased access to information about all programs when serving customers with cross-program needs. As more information and scripts are entered into the information repository; the knowledge base will become a powerful tool for providing fast and accurate responses to the public regardless of the complexity of the request;

- the capability to assist staff to precisely transfer the customer to other programs or access points in a simple and timely manner utilizing technology that enables them to make the right selection for better customer service;
- the issuance of “tickets” so that all inquiries can be tracked and status provided to the public and staff. Tracking feature will include a self help or staff supported option;
- a system that can “tag” a call with pertinent information so that the caller can be properly directed to the appropriate program area, utilizing technology that enables staff to make the right selection with minimum intervention;
- access to self-service technology via the Internet and voice/audio response (audio attendant) that will improve 24/7 access to information;
- improved accuracy of inquiry information using content management tools;
- increased quality control and service level tracking to improve service quality; and
- establishment of service level agreements with other specialized teams

6.2.3 Finance-Revenue Services

Finance-Revenue Services recently completed an organizational restructuring and consolidated all of their customer service functions into one team. This team will pilot the implementation of different types of service options in a “3-1-1” specialized team environment through the telephone and Internet channels for the public and will test the following:

- a “mixed” menu of staff supported services and self-serve Interactive Voice Response (IVR) solutions including the automation of water meter readings, tax appeal information, and parking ticket payments, inquiries and court status updates that will promote 24/7 access

6.3 Phase 2 – December 2005

The following “3-1-1” deliverables will be in place by the end of 2005 and will “go live” contingent upon the approval of the telephone number by the CRTC:

- “3-1-1” call centre team will be operational;
- training program with all Phase 2 staff will be completed;
- new knowledge base built for general inquiry information for City services;
- migration of tested service request processes to “3-1-1” team;
- continued development of on-line services;
- introduction of “3-1-1” web portal; and
- service level agreements in place.

6.4 Phase 3 – December 2006

The following “3-1-1” deliverables will be in place by the end of 2006:

- completion of migration of additional staff positions to “3-1-1”;
- training program with all Phase 3 staff will be completed;
- continued development of on-line services; and
- pilot kiosks and consolidated counters

Conclusions:

The purpose of this report is to recommend the corporate service strategy to implement a "3-1-1" type of service model. The new customer service strategy for the City defines a service transformation to a citizen-centred approach to service delivery and expanded public accessibility to information and services in the future. The “3-1-1” service strategy is built on a foundation of common policies, procedures, training and technology strategies to enable greater confidence, accountability, transparency and efficiency from a public standpoint. Smaller pilot projects are being implemented to test new “3-1-1” design features with minimized service risk to the public and to ensure that the drivers of customer satisfaction are truly being addressed.

Contact:

Colleen Bell
Manager, Corporate Client Services Initiative
CAO’s Office, Executive Management Division
Tel: 416-392-8374; Fax: 416-392-1827
E-mail:cbell@toronto.ca

Appendix “A”

GLOSSARY

There are many specialized terms and expressions that are commonly used to describe the recent changes to the delivery of customer service, especially with respect to technology. This glossary lists examples of such words and expressions that are contained in the body of this report.

Audio Attendant/Interactive Voice Response (IVR)

These expressions are used to describe automated greeting software that uses pre-recorded messages to allow callers to define the nature of their call using their voice or touch-tone phone. It may also be used to handle calls and complete simple activities without the need for human interface.

Contact Centre

A contact centre (often called a Customer Contact Centre) is an operation whose primary role is to provide services and support for customers, clients, employees or suppliers. Services are

usually provided in more than one format, i.e. by phone, by email or in person, for example, and the centre may employ both human responses as well as self-serve interactions with the public.

Channel of Access/Multi-channel

A channel refers to the stream, or format, of communication in delivering customer service. Examples of channels are: via the phone, in person, by mail, by fax, or by email. Some channels require human interaction and others are self-serve functions such as online service transactions through a web site, self-serve kiosks or service transactions over the phone where no human interaction is required (see Audio Attendant/IVR above). Multi-channel means the ability to offer and deliver customer service through variety of ways to the public.

Digital Gateway/Web Portal

An internet site that serves as an entry point or gateway to a general or specific community of interest. Popular examples of board-focus portals are Yahoo and MSN. Intranets and extranets are types of exclusive portals.

Knowledge Base

A Knowledge Base is a repository for storing information in an organized or structured way. It is a sophisticated database of information and solutions to real problems that could be posed by customers. Customer service staff are able to query the Knowledge Base in a number of ways to find the information and solutions they need to respond to customers.

Scripting Functions

This term is used to describe the interactive computer software that provides customer service staff (particularly those in a call centre environment) with the appropriate scripts to lead them through the process of handling a customer inquiry. Through a series of prompts, scripting software guides the staff person in determining the nature of the customer inquiry, allows the staff to record information about the call where applicable, and guides the staff on how to resolve the issue.

Appendix "B"

A Comparison of American 3-1-1 Cities

	Los Angeles	Chicago	Dallas	New York
Cost	\$22 million*	\$4.5 million	\$4.5 million	\$25 million*
Population	3.7 mil	2.9 mil	1.2 mil	8 million
No. of Wards/Districts	15	50	14	51

No. of Departments	52	42	37	58
No. of City Employees	46,918	40,000	13,000	251,908
No. of Calls to 3-1-1 per year	4 million	3.8 million	1 million	8 million
No. of Operators	180	70	100	200
Call Centre 24/7/365	X	X	X	X
Back up to 9-1-1	X	X	X	X
9-1-1 Centre Takes 3-1-1 Calls			X	
Track Service Requests	X	X	X	X

* Both municipalities engaged the use of external management consultants for planning and execution of their 3-1-1 implementation strategy.

Appendix “C”

“3-1-1” Customer Service Strategy

The following recommendations define the “3-1-1” Customer Service Strategy to be adopted by Council:

- (1) Council adopt the vision statement, mission statement, and strategic goals outlined in this report.
- (2) A citizen-centric model of “3-1-1” service delivery be adopted that supports services designed from the perspective of the public, enhances service quality and accountability throughout “3-1-1” service processes.
- (3) Seamless, consistent service delivery across all channels be adopted through a multi-channel approach to allow for personal choice, a combined menu of staff-supported services and self-serve options and 24/7 accessibility a through the development of the following initiatives:
 - i) one consolidated “3-1-1” call centre operation to manage the recommended service menu;
 - ii) smaller “3-1-1” specialized teams be established to manage transfer requests requiring technical expertise, appropriate management of confidential information;
 - iii) “3-1-1” service portal on the City’s Web site designed to allow citizens to conduct service transactions on-line on a 24/7 basis;
 - iv) “3-1-1” service kiosks placed in prominent public locations for ease of access; and
 - v) “3-1-1” counter teams who provide the same menu of services for “in person” requests.

- (4) The following design elements for the “3-1-1” customer service strategy be adopted:
- i) 3-1-1 will be the one published City telephone number for staff supported services excluding Members of Council information;
 - ii) telephone numbers for “3-1-1 self-serve” services will also be published;
 - iii) one published City “3-1-1” e-mail address;
 - iv) inquiries to the “3-1-1” contact centre operation are answered by staff on a 24/7 basis;
 - v) there will be an easily accessed, well-designed “3-1-1” Web portal that the public can access on a 24/7 basis;
 - vi) requests are answered in a timely manner regardless of the service channel;
 - vii) information provided on all “3-1-1” channels is consistent, accurate and up to date;
 - viii) self-serve options on the telephone/Web site/ at the counter are easy to access and are user friendly;
 - ix) the public and staff are able to look up and track the status of service requests electronically;
 - x) all staff-assisted “3-1-1” requests are handled by well-trained customer service professionals;
 - xi) interpretative services are provided in multiple languages over the telephone channel;
 - xii) customer requests are resolved at the first point of contact whenever possible;
 - xiii) all necessary transfers are “warm” to a staff and to the right team every time;
 - xiv) the public will receive a consolidated “3-1-1” response to requests requiring input from more than one service area; and
 - xv) published service standards for expected service outcomes.
- (5) The “3-1-1” service menu be adopted as described below:
- (5.1) “3-1-1” Service Menu
- i) all general inquiry information for all City services and activities;
 - ii) service requests; and
 - iii) public complaints.
- (5.2) “3-1-1” Transfer Menu
- i) citizen requests transfer to a specific individual or service;
 - ii) the inquiry is of a medical/counselling nature;
 - iii) specific technical expertise and/or interpretation is required; and
 - iv) there are confidentiality/legislative restrictions.
- (6) The Council endorse the continued co-ordination of services and public communication strategies between 9-1-1, 2-1-1 and 3-1-1 services to enhance overall service capacity.
- (7) The “3-1-1” team will be responsible for leading the coordination of non-emergency service information on behalf of the City in the event of a major incident or disaster.

Appendix “D”

Strategy Success Factors

The following strategy success factor recommendations be endorsed by Council and incorporated into the “3-1-1” implementation plan:

- (1) The Chief Administrative Officer develop a plan to establish current and proposed service levels, to identify associated financial impacts for both the “3-1-1” team and field operations and to schedule regular reviews;
- (2) The Chief Administrative Officer in conjunction with the Commissioners direct the “3-1-1” team and departments to enter into formal service level agreements outlining the roles and responsibilities of each party, communication protocols and approved script content;
- (3) The Commissioner of Corporate Services develop a comprehensive human resource strategy to support a new “3-1-1” customer service division within the context of the administrative review that is resourced to meet established service standards and is a centralized model with new customer service job profiles;
- (4) The Commissioner of Corporate Service develop and implement a formalized “3-1-1” training program comprised of an intensive skill assessment process, in-class instruction and on-site coaching for all “3-1-1” staff and departmental staff who deliver all or part of the “3-1-1” service;
- (5) The Chief Administrative Officer in conjunction with the Commissioners ensure that all relevant policies, procedures and service standards are harmonized for all teams contributing to the delivery of “3-1-1” services;
- (6) The Chief Administrative Officer in conjunction with the Commissioners ensure that all “3-1-1” identified services undergo a business process review and re-engineering if appropriate before being approved to “go live” for the public;
- (7) The Chief Administrative Officer in conjunction with the Commissioners implement a plan to establish “efficiency” benchmarks and report out on any tangible cost savings achieved on an ongoing basis. This effectiveness of this plan would be contingent upon the acquisition of a sophisticated field management tracking system;
- (8) The Chief Administrative Officer in conjunction with the Commissioners implement a corporate plan to consolidate internal inquiry lines and e-mail addresses to improve the precision of transfers;
- (9) The Chief Administrative Officer in conjunction with the Commissioners implement a plan to support the ongoing development of on-line services to expand capacity to respond to inquiries for service and complement the “3-1-1” services on the telephone channel;

- (10) The Commissioner of Corporate Services implement an enhanced content management strategy to support effective and coordinated management of information across all “3-1-1” channels;
- (11) The Chief Administrative Officer in conjunction with the Commissioners implement a well-defined quality assurance strategy for all “3-1-1” services that measures the five cornerstones of customer satisfaction; timeliness, knowledge and competence, staff courtesy/”went the extra mile”, fairness and outcome;
- (12) The Chief Administrative Officer in conjunction with the Commissioners develop and implement a plan to acquire and implement electronic management tools to build operational efficiencies and accountability throughout “3-1-1” service processes;
- (13) The Commissioner of Corporate Services implement a comprehensive technology strategy that enhances service improvement for the public and builds accountability through tracking mechanisms for “3-1-1” service processes;
- (14) The Commissioner of Works and Emergency Services and Commissioner of Corporate Services put a disaster recovery/business continuity plan in place to allow “3-1-1” services to continue in a time of emergency;
- (15) The Commissioner of Corporate Service implement a facility plan to support a centralized “3-1-1” team model;
- (16) The Commissioner of Corporate Services implement a comprehensive communications plan to build internal staff awareness and understanding of the “3-1-1” strategy and an extensive public education campaign to build public recognition of the service; and
- (17) The Chief Administrative Officer in conjunction with the Commissioners implement a phased-in implementation plan that identifies objectives for each phase that are clearly defined, achievable and will build public confidence and trust in the “3-1-1” service.

The Administration Committee also submits the report (August 16, 2004) from the Chief Administrative Officer:

Purpose:

The purpose of this report is to recommend Vision and Mission Statements to be included in the "3-1-1" Customer Service Strategy.

Financial Implications and Impact Statement:

There are no financial implications arising out of this report.

Recommendations:

It is recommended that:

- (1) Council adopt the Vision and Mission Statements for the “3-1-1” Customer Service Strategy as contained in this report; and
- (2) the appropriate City Officials be authorized and directed to take the necessary action to give effect thereto.

Background:

At the July 7th, 2004 meeting of the eCity Committee, the Chief Administrative Officer was directed to report to the September 8, 2004 meeting of the Administration Committee with suggested revised wording for the vision and mission statements contained for the “3-1-1” service strategy to place greater emphasis on the public and services to be delivered.

The original vision statement contained in the June 23rd report read as follows:

“3-1-1 opens the door to the City. Everyone will experience excellent service from the Toronto Public Service team, a recognized and proud deliverer of 3-1-1”.

The original mission statement read as follows:

“The Toronto Public Service team provides 3-1-1 “services that are high quality, well-coordinated and easy to access” to the public, with respect, professionalism and integrity”.

Comments:

“3-1-1” Vision and Mission Statements

The original vision and mission statements were developed collaboratively by an interdepartmental team representing every major customer service area, Corporate Information and Technology, Corporate Communications – Creative Services, Social Development and 2-1-1 Community Information Toronto. In developing the revised statements, staff consulted the “3-1-1” design team and the Chair of the e-City Committee. Staff also reviewed the City’s current definition of service excellence as defined in the Strategic Plan: “Public services are high quality, well-coordinated and easy to access”. These core ideals should be reflected in the City’s Vision and Mission Statements for “3-1-1” service.

The recommended vision statement for the “3-1-1” customer service strategy is as follows:

The City’s “3-1-1” service strategy will ensure that all residents, businesses and visitors receive convenient, prompt and reliable access to accurate information and non-emergency City government services.

The recommended mission statement is as follows:

The City’s “3-1-1” service strategy will enable the Toronto Public Service to provide excellent service to the public 24/7, making the best use of staff expertise, resources and technology.

These two statements together reflect the spirit of “3-1-1” in that it opens the door to City services, supports excellence in service delivery, transforms the City’s service culture and builds accountability and transparency.

Conclusions:

The recommended vision and mission statements complement the innovative and dynamic approach of the “3-1-1” customer service strategy and its design elements. These elements include: easy to access and consistent service across all channels to allow for personal choice; a combined menu of staff supported services and self-serve options; and accessibility on a 24-hour/seven-day-a-week basis.

Contact:

Colleen Bell
Manager, Corporate Client Service Initiative
CAO’s Office, Executive Management Division
Tel: 416-392-8374; Fax: 416-392-1827
E-mail: cbell@toronto.ca

The Chief Administrative Officer, and the Manager, Corporate Client Service Initiative, Executive Management, Chief Administrative Officer’s Office gave a PowerPoint presentation on the 3-1-1 strategy and a copy of which is on file in the City Clerk's Office, City Hall.

John Adams appeared before the Committee.