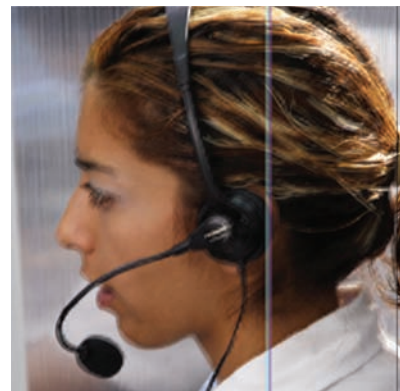


ICMA

Call 311:

Connecting Citizens to Local Government
Case Study Series



San Antonio Customer Service/311

By Cory Fleming and Bryan Barnhouse

Leaders at the Core of Better Communities

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Community Profile

City of San Antonio, Texas, Customer Service/311 Call Center

Form of Government

Council-manager

Council Districts

11 (10 by district, 1 at-large)

Population

1,202,223 (2005 American Community Survey)

Annual Budget (citywide)

\$1.7 billion

Call Center Budget

\$1.6 million

Call Center Major Components

- Physical Location: Downtown San Antonio, City Hall Annex
- Square Footage: 3,400
- T-1 Lines: 2
- Number of phones: 33
- Number of computers: 33

Number of Staff

38 Full-time equivalents

Location within City Government

Independent city department reporting directly to assistant city manager

Type of System

311 city service system (not a 911 backup)

Unique System Features and Management Tools

- Information Request Retrieval System (IRRS)
- Business Warehouse (Executive Dashboard and performance measures)
- Call management system

Citizen Feedback Mechanisms

- Customer satisfaction survey
- E-mail, written letter, or phone call to department directors
- Monthly meetings with city council members

Source: City of San Antonio, Texas, Customer Service/311 Department, 2006.



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What is 311?

In 1996, the Federal Communications Commission (FCC) reserved the use of 311 for national non-emergency use. A 311 non-emergency system allows the public to access their local government 24 hours a day, 7 days a week with such non-emergency calls as loss of water service, stray animals, and potholes.

311 is an optional service that may be purchased by a local municipality, a council of governments, a communication district, any other state or local governmental unit, or an authorized agent of any of the aforementioned legal entities. The availability of the service is contingent on the availability of facilities.

Brief History on the Origins of San Antonio's 311 System

The idea to create a non-emergency 311 system for the city of San Antonio was introduced in 1999 (Table 1) during a leadership development program for entry- and mid-level managers from across San Antonio's municipal government. As part of the program, the attendees were assigned to teams and tasked with developing concept papers on how the city should respond to certain challenges. One group was presented with the challenge of improving citizen, or customer, access to municipal services. It returned with a skeleton of a customer service program that consolidated existing city service phone numbers into a single, easy-to-remember 311 phone number. The goal was to provide San Antonio's citizens with a faster, more efficient way to access public services. Spin-off benefits of the new 311 call center included extending service hours and providing bilingual and hearing-impaired assistance.

The new system expanded on the concept behind San Antonio's Community Link Centers, which function as mini city halls in designated neighborhoods and provide citizens with convenient walk-in access to public services. The proposed 311 system took the idea one step further and allowed citizens to connect to San Antonio's city government through a simple phone call.

The city's Office of Customer Service (OCS) spearheaded the development of the new 311 system. (The OCS became a city department—Customer Service/311—with an independent budget in 1999.) OCS identified five interrelated objectives to guide the development of the 311 call center. The objectives were (and still are) to:

1. Provide easy public access by phone to all city services
2. Enhance the efficiency and quality of city customer service interactions
3. Develop clear guidelines for measuring the call center's productivity

Table 1. San Antonio 311 System Implementation Timeline

1999	2000	2001	2002	2003	2004	2005
Outline of 311 system developed by city of San Antonio leadership development program.	Branch extenders built into the 311 call center phone and computer network, thereby enabling customer service representatives (CSRs) to work from their homes if needed.	311 call center staff assigned to work at the Emergency Operations Center (EOC) to help with situational awareness during non-peak hours.			Service Level Agreements (SLAs) agreed to by partner departments.	Executive Dashboard introduced to city council district staff, city management, and department employees.

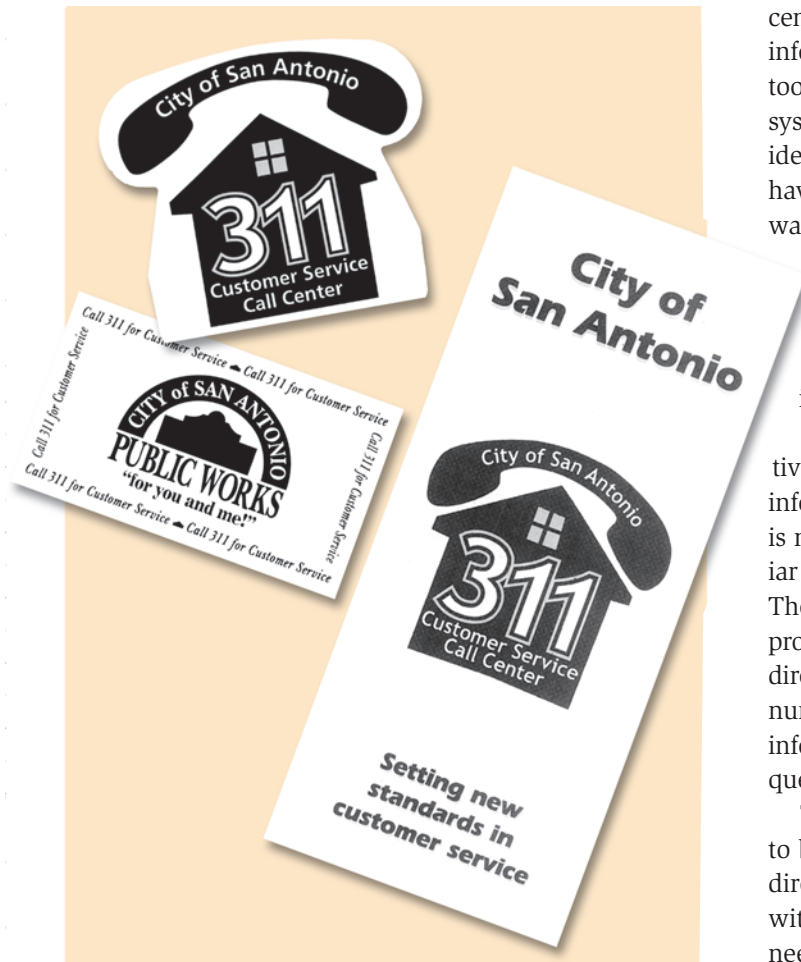
Data in Business Warehouse used to generate reports on service requests.

4. Improve the delivery of city services in a more timely and professional way
5. Reduce requests for emergency services for non-emergency events.

Selecting city departments to participate in the new system was the first priority. The city determined that approximately 95 percent of service requests came to four primary city departments:

- Public works
- Environmental services
- Neighborhood services
- Animal care.

To make the system more convenient for citizens to place service requests, the city council and senior management chose a model that merged the call management systems of these four departments. In addition, they decided that the system should be available 24 hours a day, 7 days a week.



Public outreach materials used to promote San Antonio's Customer Service/311 Call Center.

System Functionality and Major Features

The city of San Antonio opted to create its 311 system by building on systems already in use within the municipal government. Prior to establishing the new 311 system, each department maintained its own call center, work order management system, and relational database. Department employees were familiar with operating these systems and satisfied with their performance. However, city management believed that centralizing access to these services by unifying the departments' call center functions would improve customer service, lower dropped-call rates, reduce wait times, and provide greater accountability via a feedback loop. The challenge in establishing a 311 call center was to create an overlay application that could work with each of these four systems, taking in new data from calls made to the city and then transferring that data into the existing systems.

The solution required each system to be linked to a centralized computer and telephone network. The city's information technology services department (ITSD) took the lead on programming the computer and phone systems into an integrated network. ITSD "worked to identify which city services and departments would have calls routed to the 311 call center. The purpose was to set up a system where the 311 call takers could help the citizens with the information and to solve their problems on the first call. If not, then the call takers should be able to transfer the calls out to the different departments," said Jose Medina, information services manager, ITSD.

Even though the 311 customer service representatives (CSRs) are trained to serve as comprehensive information resources for the city of San Antonio, it is not realistic to expect them to be completely familiar with the detailed operations of each department. Therefore, the municipal departments of San Antonio provide the CSRs with scripts that, if needed, help them direct each call. Each script is a directory that uses key numbers and words to help the CSR find additional information on a topic and determine the appropriate questions to ask the caller.

The scripts help the CSR to work with the customer to better define the exact nature of the problem and direct the request for service to the appropriate person within a department. Use of scripts shortens the time needed to process each request. For example, when a citizen asks for a pothole to be filled, scripts allow the CSR to distinguish whether the problem is a simple



San Antonio Customer Service/311 director, Antonio Bosmans (center), and staff.

pothole or a base failure in the street. The difference between these two problems is significant for the public works department and the team that investigates the situation.

Scripts also are used when a citizen wants to speak directly with a department representative about a service request. Using the script, the CSR can ascertain the information the citizen needs and either relay that information to the citizen directly or connect the caller to the appropriate department representative.

Other characteristics of the system allow for even more technological integration, service tracking, and system management. The system works with three other complementary features, including:

- Executive Dashboard — a desktop tool that allows managers and department directors to create customized reports on service delivery
- Business Warehouse — the central data repository that collects system data on calls
- Online Citizen Request Form — while not directly connected with 311, the city Web site provides this mode of access for select services within the departments of neighborhood services, public works, and environmental services.

Finding 1 – When working with existing legacy systems, the process of introducing 311 must be one of evolution, rather than revolution, with a planned build-out and continual system improvements.

Through its legacy telephone and Internet systems, the city of San Antonio had an existing platform that allowed it to build an overlay for the new centralized system for the 311 call center. The decision to build upon these legacy systems helped San Antonio keep setup costs for the 311 call center to a minimum—there was no need to purchase new software or train the majority of staff on a new system. Some new hardware and staff time for programming made up the bulk of the budget.¹

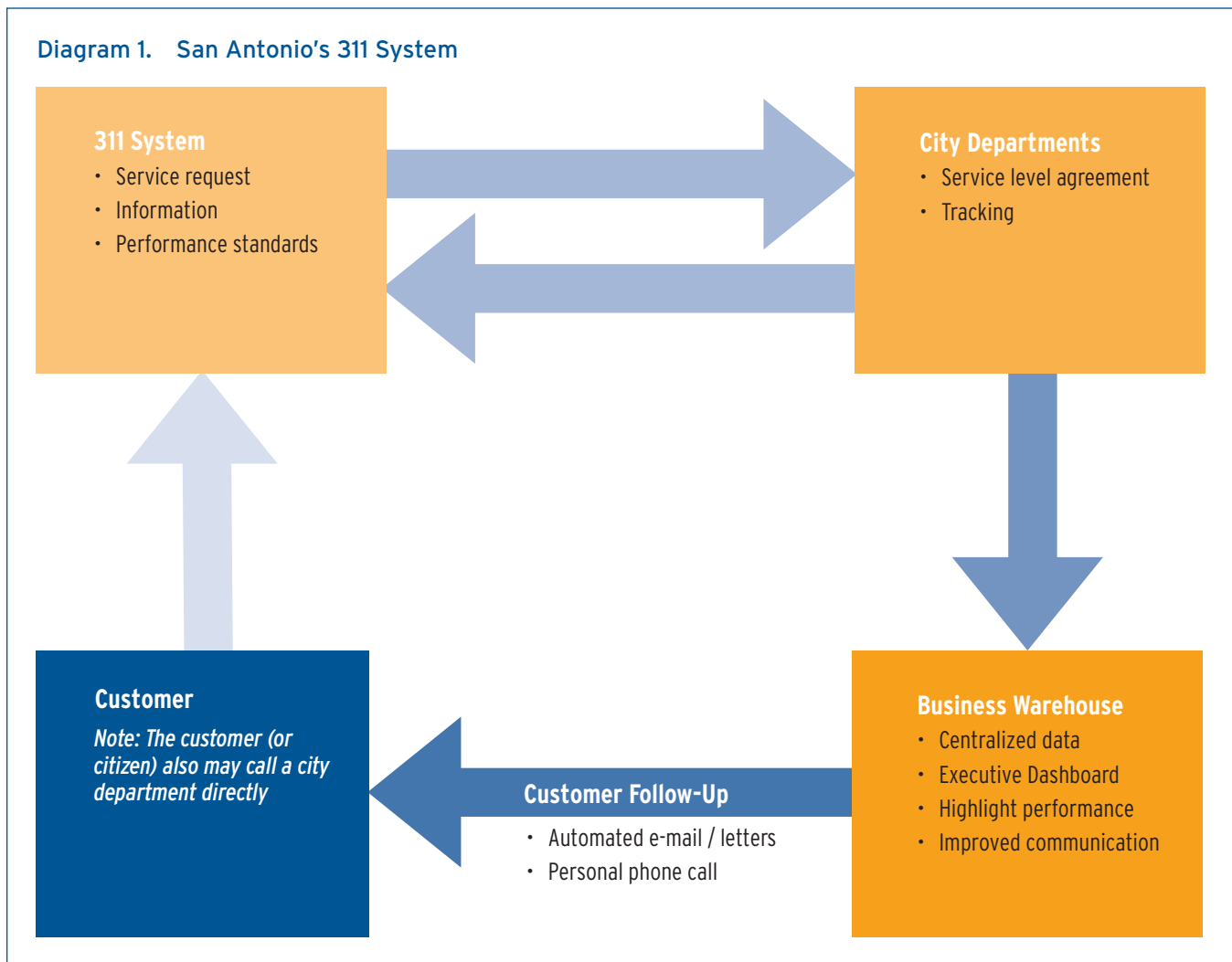
The process of integrating legacy systems was not without difficulties. ITSD programmers had to match the existing databases of information and communications components, especially the phone lines, with the new system setup. For example, existing work order legacy systems had different data fields, which needed to be merged into one master database for the overlay application. ITSD also had to determine how much capacity the system would require to meet the

¹ Implementation costs: One-time costs—\$200,000 (renovation of City Hall Annex and purchase of phones/computers/printers/faxes/furniture). Recurring costs—\$84,714 (SWB annual toll charge of \$.05/call = \$29,214; SWB service charges = \$6,000; and, SWB annual central offline charges = \$49,500).

projected volume of incoming calls. They had to determine how many phone lines were needed to handle incoming calls yet still allow open phone lines for outgoing calls. Ultimately, they decided to order two T-1 lines, but they left open a backdoor option to increase the capacity if the system was expanded regionally. ITSD had the benefit of having both experience and expertise in working with these existing systems, and as they developed the overlap applications their know-how significantly aided programmers who were familiar with existing customer service systems and the types of services provided.

After considering which resources and features were already available through the legacy systems, the system planners and programmers determined which features to add to the new system and defined the necessary parameters.

When a citizen, or customer, calls in a request for service by dialing 311, a 311 CSR answers the call and enters the details of the call into a computerized report, which automatically assigns a tracking number to the request. The CSR can either fulfill the request by providing the information directly to the customer or can pass the report electronically to the appropriate department. The department is responsible for implementing the service and responding to both the citizen and the 311 call center with the disposition of the issue. City officials also wanted the new system to provide end-to-end service; that is, they wanted the system to be integrated with other local government systems and to allow users to track progress from the time each request was placed until each request was fulfilled or closed out (see Diagram 1, below).



The information flow originates with the customer, who calls 311, which pushes the request to the appropriate department. The city department uses a suite of tools to process the request and follow up with the customer. The data are collected and used by 311 for performance measurement.

The city started designing the system by defining the broad parameters and features it needed to meet the 311 call center’s objectives and then gradually implemented new features and system improvements (see Table 1 on page 3). For instance, in 2000, the call center took advantage of a new product called a branch extender, which can be plugged into a telephone and computer network to connect remote locations. Use of this technology enabled CSRs to take customer calls from home and helped significantly expand available staff coverage for the 311 call center.

Finding 2 – Integration with local government processes and programs is critical for maximizing efficiencies and the ultimate success of the system.

San Antonio’s 311 call center functions as the “front door” for the four partner departments for which the system takes service requests. This call intake function makes it easier for the customer to reach the appropriate department. At the same time, the system requires the municipal departments to look behind that front door to determine what needs to be done after the request comes in.

Not only did the ITSD programmers have to integrate the new overlay application with the legacy systems in the department, but each department also had to share its knowledge of what needs to be done to fulfill the request once it was received. The ultimate functionality of the 311 system depended largely on the departments’ willingness to share knowledge about its procedures and practices in service delivery.

Liz Garcia, assistant director, neighborhood services, commented that “Our main concern was that the questions coming into our department are so specific, and our person who fielded some of those calls worked very closely with the processes in our department.” Transferring that type of knowledge to the 311 call center required a tremendous amount of discussion and negotiation about how to seamlessly integrate the existing systems and processes with the new system.

My fear was that we would get more work than we could possibly handle. But it ended up being a tool that I can use to help the department operate. It changed my management a little bit so that I address issues in a more focused way.

Daniel Villarreal Cárdenas, former director, environmental services

Designing and implementing the new 311 system also required forging new relationships that ushered in a new level of trust. Multiple interviews and meetings were held with department heads to work out details of the new system. Antonio Bosmans, director, customer service/311, reported, “I told [the department directors] that we will answer your call...we will get it to your people...we will decrease the lost-call rate and intend to cut it in half the first year.” Support from the city’s senior leadership, particularly the city manager, was vital during the early planning and design phases of the 311 system.

Finding 3 – Expansion of the customer service/311 system, while desirable, needs to be thought through carefully.

New features and services have the potential to create additional demand that could overwhelm the system.

As of July 2006, four municipal departments used the 311 call center to handle intake of service requests.

However, programmers designed the system to connect to as many or as few of the city services as the coordinators chose. The central design question that planners worked with was “What do we want the system to do?” This question not only determined the scope of services to be provided, but gave the programmers a blueprint for initiating connections to the legacy systems in a way that achieved the system’s objectives efficiently and effectively. Flexibility was deliberately built into the system so that it could grow to include more services.

Study participants expressed a number of different ideas for improvements and new features that would increase the system’s overall functionality. These ideas ranged from expanding the 311 coverage area to include all of Bexar County, to further integrating the 311 geospatial data with the city’s geographic information system (GIS) database, to adding more city departments to the service request intake system. Routing applications for scheduling work in different neighborhoods throughout the city was being considered by more than one partner department.

Implementing any of these features would enhance the system and provide the city with additional data and other new management tools. However, such enhancements come with trade-offs. As of July 2006, San Antonio's 311 system responds, on average, to incoming calls in less than 2 seconds, answers over 94 percent of all incoming calls, and has a lost-call rate just under 6 percent.² The system's focus on high performance has led to a substantial increase in call volume. In 2000, the 311 call center averaged 44,663 calls a month. By 2006, the monthly volume increased to 88,049 calls a month. As Jesse Alvarado, 311 services manager, notes, the 311 call center's reputation "mandates that customers will expect the same kind of performance in the future as they get today." He emphasized that when "making decisions about the future of the system, management must know about the trade-offs and resource requirements needed to maintain current service levels."

It has drastically increased our ability to monitor situational awareness, inform the public, and keep key city officials informed by having a 311 operator in the EOC.

Chief Nim Kidd, district fire chief and emergency management coordinator

Finding 4 – San Antonio's customer service system and its emergency operations center (EOC) coordinate their efforts.

The purpose of this coordination is to provide situational awareness during evening and weekend hours, as well as citizen information during emergency situations; such coordination expands the city's ability to respond effectively to emergencies.

After researching several possible structural options, San Antonio chose to maintain its 311 call center and its 911 Emergency Response System as two separate and distinct systems, each with its own management structure. San Antonio's 911 Emergency Response System is manned by certified uniformed firefighter-paramedics who can provide instructions for giving CPR, for responding to an electrocution hazard, and assisting in other ways in the event of a

life-threatening emergency. 311 CSRs are trained to offer a wide variety of information on city services and programs as well as to process non-emergency service requests from citizens. With such different focuses, city management determined that a sister relationship, where neither system was viewed as senior to the other, was the appropriate way to go.

However, the two systems do coordinate efforts in two primary ways. After the events of September 11, 2001, city management decided it was best to have

the city's emergency operations center (EOC) staffed 24 hours a day, 7 days a week. To meet this new requirement, the customer service/311 director was approached about providing 311 CSRs to the EOC to ensure that it was staffed overnight and on week-ends. Since the 311 call center was already staffed for 24 hours a day, 7 days a week, but call volume was

lighter during these time periods, city management determined that 311 CSRs could provide staffing for the EOC to maintain the city's situational awareness levels and answer 311 calls. Additional CSRs were hired by the 311 call center to provide coverage overnight and on weekends and holidays.

The two systems also coordinate efforts during declared emergencies. During a declared emergency, the EOC implements its emergency alert system. The emergency alert system operates on a geospatial database that collects and maintains accurate landline telephone numbers, including all private, public, published, unpublished, home, and business telephone numbers in the tri-county area of Bexar, Comal, and Guadalupe counties. In the event of an emergency, this database is used to map out the specific area affected by the emergency and send out a pre-recorded telephone message to all the numbers in the affected area. When such a message goes out to the public, they are instructed to call 311 for further information and updates. The 311 CSRs are briefed simultaneously on emergency information and given instructions on how to respond to specific calls related to the event.

² Two seconds refers to the length of time it takes for the CSR to answer an incoming call. The call center supervisor can check on any number of real-time measurements (e.g., number of calls on hold or number of representatives currently in the call center) through a desktop program installed on the computer.

Citizen Engagement and Public Outreach

The 311 system opened up a new channel for citizens to communicate their needs and wants to the city of San Antonio.

Before implementing the system, citizens had to guess at which department they should call with a service request. “Sometimes they found themselves in a maze, trying to find the right person to resolve a problem,” said Liz Garcia, assistant director, neighborhood services. The 311 system serves as a central point to contact the city with a request, and citizens know that when they contact the system, their request will be addressed in a timely manner. Alyssa Muñoz, former chief of staff for Art A. Hall, City Council District 8, pointed out, “Our residents have this city service available to them, and they know it works for them. People continue to use it and it lets residents know they can get involved.”

The city of San Antonio used several methods for conducting outreach and promoting interest in 311 among citizens. The public relations campaign used a “soft rollout.” Instead of publicizing the 311 system

through the local media, the city announced the new system’s availability through city council members at neighborhood meetings. The intent of the initial limited exposure was to ensure that 311 staff could handle

the call volume and demonstrate the staff’s ability to enhance the efficiency and quality of city customer service interactions.

Once the system was up and running, the director of customer service/311 began doing radio interviews and talking with the media about the new system. The strategic promotion of the 311 system at its outset helped avoid huge spikes in call volume and high lost-call rates.

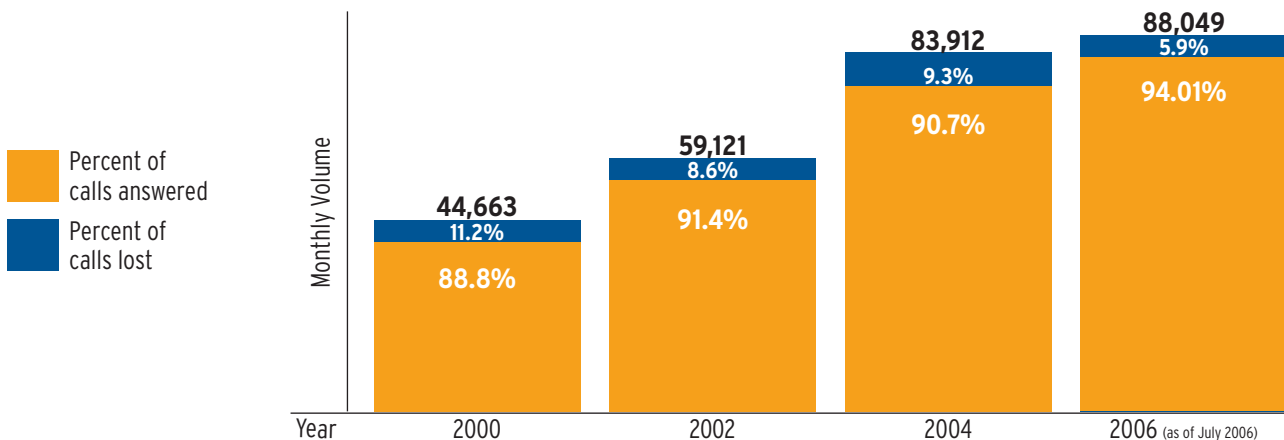
Communication with the people we’re serving is hugely important. . . , particularly in a city like San Antonio where you have a large number of different constituencies with different needs to balance. It’s to our benefit to provide the communication channels, and 311 is one of those.

Michael Armstrong,
assistant city manager and chief information officer

Finding 5 – The customer service/311 system has become a key tool for understanding the needs of citizens and an effective channel for fostering better communications with them.

Since the city of San Antonio first introduced its 311 system in 2000, the volume of calls coming into the system has increased greatly (see Table 2, below). Citizens are using the system in large numbers and are overwhelmingly satisfied with the results they

Table 2. City of San Antonio Average Monthly Call Volume



Source: City of San Antonio, Texas, Customer Service/311 Department

receive. The 311 call center automatically offers to send out a customer satisfaction survey to every tenth caller. Results from these surveys indicate 94 percent of customers have had a positive experience with the system.

Finding 6 – The customer service/311 system makes it possible to close the loop in response to citizen needs and document the results of the local government response.

The majority of the partner departments had call management systems in place before San Antonio’s 311 system was established, but they did not use the systems to collect and analyze data or track trends in customer service. The 311 system helped formalize processes and procedures used by the departments to respond to service requests from citizens and to measure the effectiveness of those practices. It also provides critical documentation of those practices by providing citizens with feedback to let them know how their request was handled.

Anyone who calls the 311 call center can ask to have a feedback call or notification made to them when the service request has been fulfilled. The system has the capacity to generate either an automated e-mail response or a written letter. Customers may also request a personal phone call from a CSR (see Diagram 1, page 6).

Data generated by the 311 system are also used to report back to the larger community and specific districts about concerns and issues. For example, City Councilman Kevin Wolff uses the data to find out what is taking place in his district. He meets once a month with homeowner associations in his district and often shares the 311 data with the presidents of the associations. “I tell them this is what we’re hearing. This is what’s coming through 311. . . . I think of it as the ending point of the feedback loop—it’s my double check.” This feedback loop with the community is implemented by San Antonio elected officials and the 311 call center management team, who use the data to provide information about municipal service hot spots and performance at community meetings. The data provide another form of accountability for customer service.

I remember being impressed with the cheerful manner and voice. 311 enabled me to be more active in the community.

**Terri Tocci, president,
Oak Grove Neighborhood Association**

Finding 7 – The customer service/311 system, by giving citizens convenient access to local government services, allows them the means to influence their local government in an easy manner.

In communities, there will always be community activists, the people who make a point of making their opinions known and take a very participatory part in local government. On the other end of the spectrum are the citizens who will never contact their local government for any reason. The majority of citizens fall somewhere in between those two ends of the spectrum. Their participation and involvement in local government depend largely on access. The easier it is for them

to get involved and to make their wants and needs known, the better the chance local governments have to understand the bigger picture. of what they need to do to provide improved customer service.

The 311 system provides an easy means for citizens to communicate their needs. If 311 were not available, said Richard Garcia, of the El Dorado Homeowners Association, “I would feel lost. I

would have to depend on my city council person. I would lose that advantage because if I saw [a] dead animal on the weekend or some other concern, then I wouldn’t be able to call 311 until Monday. Thankfully, it’s 24 hours a day, 7 days a week.”

Performance Measurements and Service Provision

The establishment of San Antonio’s customer service/311 system began a series of changes that significantly contributed to the development of performance measurements within the municipal government. Before 311 was established, the four partner departments had lost-call rates ranging from 25 to 35 percent. The 311 system set a goal to reduce the number of lost calls to 12 percent in its first year of operation.

To achieve this goal, management for the 311 call center examined their own internal operations and decided to set individual performance measurements for the call center’s CSRs. CSRs are expected to routinely achieve the following standards:

- Answer rate — 91 percent for incoming calls
- Average number of calls — 20 calls per hour and 39,400 calls per year

- Average talk time per call — 2 minutes or less
- Average time off-line per day — 1 hour or less
- Daily productivity requirement — 7.25 hours

Supervisors in the call center work directly with CSRs and coach them on their performance. Their focus is on improving listening skills and helping CSRs target their questions to zero in on the customer's real concerns and to process requests faster. Call center management places a strong emphasis on helping CSRs understand how their work fits into the overall operations of the call center and how it affects the quality of services provided by city government.

Early in the process, the city of San Antonio also established service level agreements (SLAs) to provide benchmarks for successful service provision. SLAs commit a city department to responding to a service request within a specified time period. For example, public works has committed to fixing potholes within 48 hours after receiving a service request.

Having SLAs from each city department enables call center staff to inform San Antonio citizens when they can expect to have their problem resolved. And because citizens have a timeframe during which they can expect the problem to be resolved, repeated service requests for the same problem are not as prevalent.

Finding 8 – Performance measures and service level agreements commit local government departments to responding to citizen needs in a specified time period, enhancing accountability for local government programs and services.

The four partner departments—public works, neighborhood services, environmental services, and animal care—have adopted an SLA for each of the different services they provide. The departments proposed their own SLAs based on their experience with delivering the services; the proposed SLAs and response times

were reviewed and, if deemed acceptable, approved by the city manager.

It is expected that the departments should be able to meet their SLAs at least 90 percent of the time. SLAs may be adjusted if there are mitigating circumstances at work. For example, if a severe storm hits the city and results in an exceedingly high number of downed trees and fallen branches, environmental services may need to temporarily extend its SLA for brush pickup. Under normal operating conditions, though, if an SLA is not being met 90 percent of the time, the department's response to service requests is reviewed by city management.

Because every call gets a request number, I can follow up with the appropriate city department and find out what happened with the request. Who went out there? Who was the investigator? Did the investigator talk to the resident? What does he remember saying?... It's a checks-and-balances system.

**Alyssa Muñoz, former chief of staff,
Art A. Hall, City Council District 8.**

Finding 9 – Data collected through the customer service/311 system can aid local government departments in workload management and resource allocation by determining where demand is greatest.

All calls coming into the 311 call center capture an address for the service request. These data allow the city to assess problems in different geographical areas around the city. By querying the database or reviewing system reports, department directors and other city management can examine trends throughout the city. Where are the most calls coming in for brush pickup? Have there been an unusually high number of calls coming in for street repair? According to Daniel Villarreal Cárdenas, former director, environmental services, "Now with the number of calls coming in at such a significant volume, you can begin to do better service scheduling. Before 311, you were running back and forth trying to do everything [rather than planning what should be done next]."

311 data are particularly useful for discussions concerning budget matters. The data provide solid evidence of how a city department is responding to service requests. If a department experiences problems responding to a particular request within

the specified SLA's time frame, it may mean that departmental resources need to be adjusted among programs. Or it may mean additional resources are required. If, for example, city management wants to see the time frame for a given SLA reduced, there is a business basis for discussing what level of resources (i.e., the number of employees and amount of equipment) is needed to produce the desired results.

In 2005, San Antonio's 311 call center established a new data-reporting system, known as the Executive Dashboard. Using data collected through the call center, the Executive Dashboard enables city management and department directors, as well as city council members, to access online reports about how well each partner department is responding to its SLAs. These reports can be broken down by department, type of service, and city council district, and this new feature provides real-time information on what is happening in the field.

Elected officials and their staff frequently refer to Executive Dashboard reports when communicating with department management or constituents. City management and department heads use reports when reviewing overall department performance or by type of service. "Through 311, we can capture pretty easily some very basic things that are not necessarily easy to capture, and that is very valuable for us. It gives us a way to keep improving the way we do things," said Michael Armstrong, assistant city manager and chief information officer.

Finding 10 – Having the customer service/311 system allows policymakers and upper management to spend more time setting long-term policy for the community.

The city of San Antonio has a council-manager form of government. City council members are elected to represent the needs of their specific districts. A result of

this form of government is that, over time, citizens got in the habit of routinely calling their city council member when they had a request for a city service instead of calling the appropriate city department. Fulfilling the role of ombudsman—responding to individual service requests—took a tremendous amount of time on the part of staff of members of the city council, often

to the detriment of long-term policy issues that needed to be studied.

With the advent of the 311 call center, citizens have a system in place for accessing city services without having to contact their city council member. City council members and staff report that the 311 call center saves staff time and increases overall productivity. They also note that a citizen's concern can be addressed more quickly going through the 311 call center than through a council member's office since the system is set up to direct calls immediately to the appropriate department.

The nice part of 311 data is that . . . it's hard data. How many calls did you get? What categories did they fall into? It's nice to have that at my fingertips, as an elected official, when I'm trying to decide where I'm going to spend dollars within my district. . . . It's nice to have that sort of data feed to help guide me in my decisions.

**City Councilman Kevin Wolff
District 9**

Staff Training

The 311 CSRs are trained to serve as comprehensive information resources for the city of San Antonio. They must be familiar with the different services offered by the four partner departments, and it is imperative that they maintain a working knowledge of other city programs.

Finding 11 – Continual training and retraining of staff members to keep them current on developments throughout the locality is a must.

The city of San Antonio's training program for new CSRs is an extensive one. Training a new employee generally takes between four to six weeks and costs about \$2,700 per employee. According to Antonio Bosmans, director, customer service/311, the up-front investment in the employee makes good financial sense. "You're going to incur that cost anyway, simply because you've hired someone." New hires for the 311 call center are evaluated on customer service skills and computer literacy.

Training for new hires begins with an orientation with the director of the customer service/311, who discusses the goals of the 311 call center and employee expectations. The training runs approximately two-and-a-half hours and is based on what the director hears from the departments. It covers anything from what is the definition of customer service, to phone etiquette, to dealing with irate customers. After this orientation, each new hire is assigned a mentor, a senior CSR who knows the system and will individually help the new CSR become familiar with it.

Each CSR must develop an in-depth working knowledge of the service request codes provided by the four departments using 311 for call intake. Every entry made into the 311 system must be assigned a code, and there are 162 types of service requests, each with its own unique code, divided among the four departments. “Since the system is code driven, there is a process in place to train new hires on the codes. Some citizens will call with long lists of complaints and issues. The new hire must match the issues to their appropriate codes and then have the list checked by a trainer,” said Jesse Alvarado, 311 services manager. As a new hire becomes more and more familiar with the system, he or she can begin taking calls with less pressure.

The CSRs are viewed as central resources for knowledge about all city services and programs, and as such, the 311 call center provides ongoing training for all CSRs. In particular, if a department is rolling out a new program or service, training is provided on it to prepare the CSRs. The call center supervisors meet with CSRs on a regular basis and conduct bi-monthly assessments to talk about the quality of the service provided. All calls are recorded so that specific actions and lessons learned can be referenced during the assessments.

Staff from the city council district offices and partner departments also can participate in the 311 training program. Environmental services, for instance, has three team members assigned to process incoming 311 service requests. The supervisor for this team received additional training on the system so that performance reports could be generated for the

department director. The director and several managers also were trained on the system so that they too had a working knowledge of the intake procedures.

Finding 12 – Retaining departmental knowledge, by redeploying existing staff to the new customer service/311 system and giving them cross-training opportunities, can ease the transition and ensure that citizens reach staff who have the breadth of knowledge to handle their request.

Each of the four partner departments redeployed employees to help staff the new 311 call center. These redeployed employees brought with them the departmental knowledge of what information was needed in order for the department to respond to the service request. During the first 90 days of operation, incoming calls were routed to employees based on which department the employee transferred from. Under the system, employees from animal care continued to receive calls on animal issues and employees from environmental services answered calls on garbage and brush pick up. This was accomplished by retaining existing service phone numbers from the four departments and forwarding the calls to the new system.

This practice enabled employees with the greatest knowledge of a department to continue to respond to those types of service requests during the start-up phase of the 311 call center.

At the same time, employees from the four partner departments also began cross-training with each other. Former animal care employees trained former environmental services and neighborhood services people on how to handle animal care calls. This practice allowed the employees to share their own knowledge and assist other employees better meet the demands of their new responsibilities. “They want to teach others what they know,” said Antonio Bosmans, director, customer service/311 call center. As a result of these efforts to work with existing employees, the turnover rate of staff was less than 2 percent during the first two years of the 311 call center.

If they're (311 customer service representatives) half as efficient as they appear to be, I want those people working as supervisors.

**Terri Tocci, president,
Oak Grove Neighborhood Association**

Call center management did have to overcome some employee resistance to staff redeployment. In addition to providing a financial incentive in the form of higher pay for the new knowledge and responsibilities employees assumed, the management team worked on creating a positive work environment. For example, the call center will frequently sponsor contests among employees for most calls answered in a given time period. Winners will receive a free lunch or an afternoon off. The focus is on creating an organizational culture that supports employee development so that staff are able to perform at their very best.

Methodology and List of Study Participants

The authors conducted in-depth interviews with seventeen individuals familiar with the city of San Antonio's 311 call center and its operation in July 2006. These individuals—including policy makers, upper management within the municipal government, call center staff, and citizens—represented a diverse group of interests and perspectives. Four separate interview protocols, each designed with a specific audience in mind, guided the questioning during the interviews. The authors used a conversational interviewing technique in order to more fully explore the participants' experiences and perceptions.

All interviews were tape recorded and reviewed while notes for this report were compiled. Written permission was sought before attributing any quotes to an individual or organization. The authors wish to thank all the study participants for taking the time to discuss the city of San Antonio's 311 call center. Their contributions to the study were invaluable.

- Jesse Alvarado, 311 Services Manager, City of San Antonio
- Michael Armstrong, Assistant City Manager & Chief Information Officer, City of San Antonio
- Antonio Bosmans, Director, Customer Service/311, City of San Antonio
- Chris Callanen, Public Works, City of San Antonio
- Daniel Villarreal Cárdenas, former Director, Environmental Services, City of San Antonio
- Belinda Esquivel, Customer Service/311, City of San Antonio
- Liz Garcia, Assistant Director, Neighborhood Services, City of San Antonio
- Richard Garcia, Member, Memorial Heights Neighborhood Association, City of San Antonio
- Art Garza, Code Compliance Contact, El Dorado Homeowners Association
- Perla Guzman, Animal Care Services, City of San Antonio
- Chief Nim Kidd, District Fire Chief and Emergency Management Coordinator, City of San Antonio
- Jose Medina, Information Services Manager, Information Technology Services Department, City of San Antonio
- Alyssa Muñoz, former Chief of Staff, Art A. Hall, City Council District 8, City of San Antonio
- Terri Salazar, Special Projects Officer, Customer Service/311, City of San Antonio
- Josie Skeins, Information Technology Services Department, City of San Antonio
- Terri Tocci, President, Oak Grove Neighborhood Association
- Thomas Wendorf, Director, Public Works, City of San Antonio
- Councilman Kevin Wolff, City Council District 9, City of San Antonio

Summary of Findings

System Functionality and Major Features

Finding 1 – When working with existing legacy systems, the process of introducing 311 must be one of evolution, rather than revolution, with a planned build-out and continual system improvements.

Finding 2 – Integration with local government processes and programs is critical for maximizing efficiencies and the ultimate success of the system.

Finding 3 – Expansion of the customer service/311 system, while desirable, needs to be thought through carefully. New features and services have the potential to create additional demand that could overwhelm the system.

Finding 4 – San Antonio's customer service/311 system and its emergency operations center (EOC) coordinate their efforts. The purpose of this coordination is to provide situational awareness during evening and weekend hours, as well as citizen information during emergency situations; such coordination expands the city's ability to respond effectively to emergencies.

Citizen Engagement and Public Outreach

Finding 5 – The customer service/311 system has become a key tool for understanding the needs of citizens and an effective channel for fostering better communications with them.

Finding 6 – The customer service/311 system makes it possible to close the loop in response to citizen needs and document the results of the local government response.

Finding 7 – The customer service/311 system, by giving citizens convenient access to local government services, allows them the means to influence their local government in an easy manner.

Performance Measurements and Service Provision

Finding 8 – Performance measures and service level agreements commit local government departments to responding to citizen needs in a specified time period, enhancing accountability for local government programs and services.

Finding 9 – Data collected through the customer service/311 system can aid local government departments in workload management and resource allocation by determining where demand is greatest.

Finding 10 – Having the customer service/311 system allows policymakers and upper management to spend more time setting long-term policy for the community.

Staff Training

Finding 11 – Continual training and retraining of staff members to keep them current on developments throughout the locality is a must.

Finding 12 – Retaining departmental knowledge, by redeploying existing staff to the new customer service/311 system and giving them cross-training opportunities, can ease the transition and ensure that citizens reach staff who have the breadth of knowledge to handle their request.

San Antonio Customer Service/311

Supplement

This supplement contains additional background information on the city of San Antonio's 311 call center.

System Costs

During the initial design and start-up of San Antonio's 311 system in the late 1990s, much of the technology design work was a collaborative effort between two primary units within the local government—what was then the San Antonio Office of Customer Service (which evolved into the San Antonio Customer Service/311 Department) and the Information Technology Services Department (ITSD). ITSD serves as an enterprise function for the local government, providing services to all local government departments in San Antonio. As a result, ITSD staff time spent on the creation of the overlay application and knowledgebase used by the city's 311 system was not tracked.

San Antonio's fiscal year runs from October 1, to September 30 with the 311 call center's annual expenditures running at approximately \$1.6 million.

The following categories are in the budget.

- **Personnel Services** includes all line items associated with staff costs. This includes salaries, FICA & Social Security, Life Insurance, Health Contributions, Language Skill Pay, Overtime, Shift Differential, and TMRS contribution.
- **Contractual Services** includes all line items associated with outside contractors for services such as Janitorial, Plant Maintenance, Pest Control, Bottled Water, Copiers, Alarm, and Cash Pick-up.
- **Commodities** includes all line items associated with consumable products such as Office Supplies, Binding & Printing, and Food.
- **Self-Insurance** includes all lines items associated with the city's self-insurance requirements, and General Liability.
- **Capital Outlay** includes all lines items associated with the purchase of capital items generally considered to be fixed assets such as Computers, Printers, and Furniture.

San Antonio's 311 call center operates 24 hours a day/7 days a week. Staffing for the center varies by shift, based on an analysis of when call volumes are highest. The highest number of calls generally comes in between 8:00 a.m. and 10:00 a.m., and the busiest days in terms of call volume are Monday and Tuesday.

User Feedback

San Antonio established its 311 system as an end-to-end service (See Diagram 1). From the time a service request comes into the system (or the front end), it is tracked through the central database using a service request number. This enables the customer to call back at any time and ask for an update on the city's progress in responding to the request. When city departments have completed their response to a request, it is closed out in the system and, if the citizen requested notification, an automated e-mail, letter, or personal phone call is made to let the citizen know what action has been taken.

FY 2006	Year-to-Date Expenditures
Personnel Services	\$ 1,219,532.29
Contractual Services	\$ 92,528.46
Commodities	(28,537.89)
Self Insurance/Other	\$ 246,812.52
Capital Outlay	\$ 4,081.31
TOTAL	\$1,534,417

Data from calls to the system are compiled and reports generated through the system's Executive Dashboard. These reports are used by city council members and department heads when they go out to meet with citizens at various neighborhood association meetings. City Council member Kevin Wolf noted that he routinely takes information from the 311 system back to community leaders and homeowner associations to tell citizens what requests are made most frequently within their neighborhoods. The hard data provided by the 311 system frequently confirms the citizens' anecdotal evidence of neighborhood problems.

The 311 data provide a starting point for a greater dialogue between the citizens of San Antonio and local government officials on what services are needed and what long-term strategies should be adopted. For example, if a high volume of calls for illegal dumping in a certain area are coming in, personnel from environmental services will work with the neighborhood residents to set up times for a roll-off garbage bin to be available in a centralized location. Or if a neighborhood is having an unusually high number of reoccurring potholes on a given street, public works will investigate whether a replacement of the roadbed is needed and city council member will consider the need in allocating budget dollars.

Performance Measurement/ Management

The four city departments participating in the 311 system—environmental services, public works, neighborhood services, and animal care—have adopted service level agreements (SLAs) for each of the different services they provide. SLAs commit the departments to responding to citizens needs in a specified time period. For example, public works has committed to fixing potholes within 48 hours after receiving a service request. When citizens call in with a service request, they are told what the SLA is for that service and when they can expect to have the problem resolved.

The departments are expected to meet their SLA goals 90 percent of the time under normal circumstances. During emergency situations or unusual events, for example, a major storm that downs a large number of tree branches, SLAs can be suspended or adjusted to give the department adequate time to respond. After the event is over, however, the SLA returns to the previous goal.

City management and policy makers routinely review how departments are doing in meeting their SLA goals. The 311 system's Executive Dashboard feature reports performance records by service units within city departments and by geographic regions in the city. City council members and department heads are provided with this information to report on at neighborhood association meetings. The city also produces a quarterly newsletter, CityLink Letter, to let citizens know about what is happening in city government. But because there are so many neighborhood associations in San Antonio, the preferred method is to have city council members directly report to the public on the kinds of service requests and the response times for those requests.



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The mission of ICMA is to create excellence in local governance by developing and fostering professional local government management worldwide.

ICMA National Study of 311 and Customer Service Technology

With funding from the Alfred P. Sloan Foundation, ICMA is conducting the first ever national study on 311 and related customer service technology used by local governments in the United States. The study will explore the benefits of and barriers to local governments adopting integrated systems for customer service. A national survey of local governments, together with information collected from a series of in-depth case studies, will help create a portrait of how local governments are using such systems to respond to citizen needs and build the local government-constituent relationship. When viewed together, the survey results and findings from the case study research will present current practices and successful implementation of coordinated systems for customer service.

For more information about the study, contact...

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