



Program: ServiceOakville

Program Based Budget

2010 - 2012

Overview

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| Program: ServiceOakville |
| Vision Statement: To be recognized leaders in providing strategic, high-quality advice and services that serve to engage, inform and serve the community, our stakeholders and town employees. |
| Mission Statement: To help the town achieve its goals and objectives by delivering services valued by the organization and the community, and to provide leadership in the implementation of the town's customer service strategy by delivering accessible, integrated customer service solutions. |

Introduction

Accountability to taxpayers requires the Town to measure its progress towards achieving the goals and priorities set by Council, to provide timely and relevant information about the town's service delivery, as well as provide effective and accessible customer service that meets the needs of the community.

The program supports town programs and services with the development and implementation of the town's customer service strategy and solutions. The focus area for 2010 will be to further develop customer-driven solutions that enhance citizen engagement, and to identify opportunities to increase the efficiency and effectiveness of town services.

Program Services

The ServiceOakville Program provides the following services:

- Main reception customer service at Town Hall
- Ongoing implementation of service-oriented projects



Major Accomplishments in 2009

ServiceOakville

Implementation of the town's customer service strategy continued. Highlights in 2009 were the completion of customer service training for all front-line staff, the development of a pilot customer inquiry tracking system in two departments and opening of the fully accessible ServiceOakville desk at town hall. The desk provides service and information to visitors to town hall. First contact resolution is available for many public inquiries including tourism and selected parking and tax payments. Over 3,000 tax payments were received at the new service desk from April to June.

Program Significant Issues

ServiceOakville will continue to require considerable time commitment from other departments to complete their business process definitions as corporate-wide customer tracking continues to be implemented. ServiceOakville is limited in its ability to further expand services provided by the ServiceOakville desk due to staffing constraints.

The department will need to expand and enhance communications and customer service to meet the needs of a changing and diverse community as well as requirements of the Accessibility for Ontarians with Disabilities Act.

Strategic Objectives (Initiatives) for 2010 – 2012

| Council's Strategic Goal/Area of Focus (If Applicable) | Department Strategic Objective | Guidelines for Deliverables | Expected Outcome/Timing | Program Service |
|--|---|--|---|------------------|
| To be accountable in everything we do; To be fiscally sustainable | Provide customer service statistics | Develop and provide statistics on customer service delivery to assess cost of delivering services through various channels | Baseline to be established in pilot departments. Ongoing activity | Customer Service |
| To continuously improve our programs and services | Customer service enhancements | Expand and simplify public access to town services through e-mail, face to face, web, and telephone channels | Ongoing | Customer Service |
| | Improve customer incident and service request tracking and management | Develop recommendations for long-term strategic CRM solution with stakeholder departments | Q4 2010 | Customer Service |
| To have programs and services that are accessible | Ensure inclusive communications that reflect the Town's commitment to accessibility and diversity | Create effective communication methods and programs to meet the needs of diverse groups | Ongoing | Customer Service |

ServiceOakville 2010 Expenditure Summary by Program and Service

| | 2009 Budget | 2009 YTD Actuals | 2010 Base Budget | Base Budget Change (%) | 2010 Requested Adjustments | 2010 Requested Budget | 2009 - 2010 Change (%) |
|-------------------------------------|----------------|------------------------|------------------------|------------------------------|----------------------------------|-----------------------------|------------------------------|
| EXPENDITURE BY PROGRAM | | | | | | | |
| Service Oakville | 205,900 | 0 | 589,200 | 186.2% | 0 | 589,200 | 186.2% |
| Total EXPENDITURE BY PROGRAM | 205,900 | 0 | 589,200 | 186.2% | 0 | 589,200 | 186.2% |
| REVENUES | | | | | | | |
| Activity Revenue | 9,800 | 0 | 9,800 | 0.0% | 0 | 9,800 | 0.0% |
| Total Revenues | 9,800 | 0 | 9,800 | 0.0% | 0 | 9,800 | 0.0% |
| Tax Levy Requirement | 196,100 | 0 | 579,400 | 195.5% | 0 | 579,400 | 195.5% |
| TAX LEVY BY PROGRAM | | | | | | | |
| Service Oakville | 196,100 | 0 | 579,400 | 195.5% | 0 | 579,400 | 195.5% |
| Total TAX LEVY BY PROGRAM | 196,100 | 0 | 579,400 | 195.5% | 0 | 579,400 | 195.5% |
| Gross Expenditures by Type | | | | | | | |
| Salaries, Wages, Benefits | 165,000 | 0 | 553,000 | 235.2% | 0 | 553,000 | 235.2% |
| Materials & Supplies | 9,000 | 0 | 9,100 | 1.1% | 0 | 9,100 | 1.1% |
| Purchased Services | 31,900 | 0 | 27,100 | (15.0%) | 0 | 27,100 | (15.0%) |
| Gross Operating Expenditures | 205,900 | 0 | 589,200 | 186.2% | 0 | 589,200 | 186.2% |

ServiceOakville

2011 - 2012 Expenditure Summary by Program and Service

| | 2010 Requested Budget | 2011 Preliminary Base Budget | Base Budget Change (%) | 2011 Requested Adjustments | 2011 Forecast Requested Budget | 2010-2011 Change (%) | 2012 Forecast Base Budget | 2012 Requested Adjustments | 2012 Forecast Requested Budget | 2011-2012 Change (%) |
|-------------------------------------|-----------------------------|------------------------------------|------------------------------|----------------------------------|--------------------------------------|----------------------------|---------------------------------|----------------------------------|--------------------------------------|----------------------------|
| EXPENDITURE BY PROGRAM | | | | | | | | | | |
| Service Oakville | 589,200 | 601,300 | 2.1% | 0 | 601,300 | 2.1% | 615,900 | 0 | 615,900 | 2.4% |
| Total EXPENDITURE BY PROGRAM | 589,200 | 601,300 | 2.1% | 0 | 601,300 | 2.1% | 615,900 | 0 | 615,900 | 2.4% |
| REVENUES | | | | | | | | | | |
| Activity Revenue | 9,800 | 9,800 | 0.0% | 0 | 9,800 | 0.0% | 9,800 | 0 | 9,800 | 0.0% |
| Total Revenues | 9,800 | 9,800 | 0.0% | 0 | 9,800 | 0.0% | 9,800 | 0 | 9,800 | 0.0% |
| Tax Levy Requirement | 579,400 | 591,500 | 2.1% | 0 | 591,500 | 2.1% | 606,100 | 0 | 606,100 | 2.5% |
| TAX LEVY BY PROGRAM | | | | | | | | | | |
| Service Oakville | 579,400 | 591,500 | 2.1% | 0 | 591,500 | 2.1% | 606,100 | 0 | 606,100 | 2.5% |
| Total TAX LEVY BY PROGRAM | 579,400 | 591,500 | 2.1% | 0 | 591,500 | 2.1% | 606,100 | 0 | 606,100 | 2.5% |
| Gross Expenditures by Type | | | | | | | | | | |
| Salaries, Wages, Benefits | 553,000 | 565,100 | 2.2% | 0 | 565,100 | 2.2% | 579,700 | 0 | 579,700 | 2.6% |
| Materials & Supplies | 9,100 | 9,100 | 0.0% | 0 | 9,100 | 0.0% | 9,100 | 0 | 9,100 | 0.0% |
| Purchased Services | 27,100 | 27,100 | 0.0% | 0 | 27,100 | 0.0% | 27,100 | 0 | 27,100 | 0.0% |
| Gross Operating Expenditures | 589,200 | 601,300 | 2.1% | 0 | 601,300 | 2.1% | 615,900 | 0 | 615,900 | 2.4% |

Service: Customer Service Strategy

Purpose of Service:

To provide leadership in the implementation of the town's customer service strategy under the name of ServiceOakville. ServiceOakville provides citizens with integrated service delivery, and works with departments to develop solutions to improve customer service from a process and system perspective including customer incident tracking

Service: Customer Service Strategy

| Activity | Responsibilities | Current Service Level |
|--|---|---|
| Initiate and manage cross functional projects to support the town's customer service strategy. | <ul style="list-style-type: none"> Develop customer service standards and protocols Define and lead projects to implement town-wide incident management systems (CRM) by working closely with department stakeholders and | <p>Delivery of prioritized projects, subject to resource availability</p> <p>Monitor standards compliance</p> <p>Identify and implement additional services at the ServiceOakville desk</p> |

| Activity | Responsibilities | Current Service Level |
|---------------------------|---|--|
| | <p>IS+S</p> <ul style="list-style-type: none"> • Continue to develop service delivery opportunities for the ServiceOakville desk at Town Hall • Define and lead projects to improve telephone, face to face, email and web contact with the town • Support other departments in new customer service initiatives | <p>Provide support to other departments as they identify a role for ServiceOakville in aspects such as training, or rollout of customer initiatives</p> <p>Work with cross functional teams to identify and implement effective solutions that enhance public engagement</p> |
| Customer Service Delivery | <ul style="list-style-type: none"> • Delivery of information and services to achieve first contact resolution at the ServiceOakville desk at Town Hall | <p>Provide information and applications for a variety of town departments</p> <p>Provide information and guidance to all visitors to Town Hall</p> <p>Provide telephone, email and counter support for Oakville tourism inquiries. Maintain Town Hall tourism display</p> <p>Distribute information and materials on behalf of Halton Waste Management for visitors to Town Hall</p> <p>Manage service level agreements with primary service departments. Provide ServiceOakville Desk and 311 statistical reports</p> |
| External partnerships | <ul style="list-style-type: none"> • Liase with external agencies to improve diversity and accessibility of services | <p>Ongoing maintenance of 311 call templates to reflect departmental changes and ensure correct call transfers</p> <p>Liaison with external agencies to improve diversity and accessibility of services</p> <p>Provide access to Language Line for all town departments</p> <p>Work with external agencies and other municipalities to identify opportunities to implement service enhancements that will benefit Oakville stakeholders</p> |

**Key Performance Indicators
ServiceOakville**

| CUSTOMER BENEFITS/IMPACTS | INDICATORS | Target FY09 | Actual/Projected FY 09 | Target FY 10 |
|---|--|------------------------|-----------------------------------|-------------------------|
| Improved access to first contact resolution | • % of citizens surveyed who agree that it is easy to find the right staff to deal with a question | n/a | 77% | 77% |
| | • % closed inquiries at the ServiceOakville Desk | n/a | 49% | 55% |
| Access to accurate information | • % of citizens surveyed who agree that the service they received was accurate and dependable | n/a | 84% | 84% |
| | • % of citizens surveyed who agree that town staff are knowledgeable | n/a | 89% | 89% |
| | • Number of complaints received regarding ServiceOakville accuracy | n/a | TBD | TBD |
| Provide support to continuously improve programs and services across the town | • Actual vs plan number of business units enabled with an incident tracking system | n/a | 100% | 100% |
| | • Actual vs plan number of business units supported by ServiceOakville | n/a | 100% | 100% |
| | • # of occurrences of not meeting service level agreements | n/a | 0 | 0 |

| PROGRAM OUTCOMES | INDICATORS | Target FY09 | Actual/Projected FY 09 | Target FY 10 |
|--|--|------------------------|-----------------------------------|-------------------------|
| Engaged and effective employees committed to providing high quality service to all our customers | • % employees surveyed who agree that customer service is important to the organization | n/a | 81% | 85% |
| | • % of employees surveyed who believe they have a good understanding of their customer needs | n/a | 85% | 85% |
| | • % of public surveyed who believe employees are respectful | n/a | 93% | 93% |
| | • % of customer service staff provided with | 100% | 90% | 100% |

| | | | | |
|-------------------------------------|---|-----|-----|------|
| | <ul style="list-style-type: none"> customer service training Complaints received about customer service provided by ServiceOakville as a percentage of total incidents handled | n/a | 0% | < 2% |
| High citizen satisfaction with town | <ul style="list-style-type: none"> % of citizens surveyed who are satisfied with town programs and services % of citizens surveyed who are satisfied with the Town of Oakville government | n/a | 88% | 88% |
| | | n/a | 78% | 78% |

ServiceOakville Budget Summary

| | 2009 Approved Budget | 2009 YTD Actuals | 2010 Base Budget | 2009-2010 Base Budget Change (%) | 2010 Recommended Adjustments | 2010 2010 Budget | 2009-2010 Change (%) | 2011 Forecast Budget | 2012 Forecast Budget |
|-------------------------------------|----------------------------|------------------------|------------------------|--|------------------------------------|------------------------|----------------------------|----------------------------|----------------------------|
| By Expenditure Type | | | | | | | | | |
| Salaries, Wages, Benefits | 165,000 | 0 | 553,000 | 235.2% | 0 | 553,000 | 235.2% | 565,100 | 579,700 |
| Materials & Supplies | 9,000 | 0 | 9,100 | 1.1% | 0 | 9,100 | 1.1% | 9,100 | 9,100 |
| Purchased Services | 31,900 | 0 | 27,100 | (15.0%) | 0 | 27,100 | (15.0%) | 27,100 | 27,100 |
| Other Expenditures | 0 | 243 | 0 | 0.0% | 0 | 0 | 0.0% | 0 | 0 |
| Gross Operating Expenditures | 205,900 | 243 | 589,200 | 186.2% | 0 | 589,200 | 186.2% | 601,300 | 615,900 |
| Activity Revenue | 9,800 | 0 | 9,800 | 0.0% | 0 | 9,800 | 0.0% | 9,800 | 9,800 |
| Tax Levy Requirement | 196,100 | 243 | 579,400 | 195.5% | 0 | 579,400 | 195.5% | 591,500 | 606,100 |
| By Service Programs | | | | | | | | | |
| ServiceOakville | 196,100 | 243 | 579,400 | 195.5% | 0 | 579,400 | 195.5% | 591,500 | 606,100 |
| Service Total | 196,100 | 243 | 579,400 | 195.5% | 0 | 579,400 | 195.5% | 591,500 | 606,100 |

Service Results Narrative:

The ServiceOakville strategy, which promotes multi-channel customer access, was approved by Council in 2008. Service standards and protocols were established, and access to interpreter services and Bell Relay were launched. Customer service training for front line staff was initiated in 2008, and training was concluded in 2009, with a maintenance plan to be developed.

As part of ServiceOakville's customer service leadership initiatives, the first stage of improved first contact resolution was implemented at Town Hall. The ServiceOakville Desk provides main reception services, in addition to tax, parking, and tourism support. It is also working in partnership with Halton Region to distribute recycling bins to new Oakville residents through our Town Hall location.

As identified in the customer service strategy, a system to track incidents raised by customers (CRM), and the accompanying department process re-engineering is a key deliverable of ServiceOakville. This activity was initiated in 2009, and the pilot will expand through 2010, continuing into subsequent years.

2010 Plan

Program Base Budget Adjustments

| Activity/Responsibility | Reason for Adjustment | Service Level | Department Objective | Cost |
|-------------------------|---|--------------------------------|--|-----------|
| Customer Service | Adjust budget for inflation impacts on salaries and benefits, materials and supplies, and purchased services | Maintain current service level | Ensure appropriate skilled staff and resources to administer current program services | \$9,200 |
| Customer Service | Reallocation of personnel salaries and benefits from other areas due to the implementation of ServiceOakville | Maintain current service level | Ensure appropriate skilled staff and resources to administer current program services. To continuously improve our programs and services. | \$299,100 |
| Customer Service | Reallocation of Accessibility Temporary employment budget from Regulatory Services for the introduction of Accessibility/Disability position in ServiceOakville | Maintain current service level | Ensure appropriate skilled staff to administer current program services | \$80,000 |
| Customer Service | Reallocate and reduce budget from Strategy, Policy and Communication for purchased services | Maintain current service level | To reduce overall tax levy | (\$5,000) |

2011 Plan

Program Base Budget Adjustments

| Activity/Responsibility | Reason for Adjustment | Service Level | Department Objective | Cost |
|-------------------------|--|--------------------------------|---|----------|
| Customer Service | Increase base budget for inflation and merit impact on salaries and benefits | Maintain current service level | Ensure appropriate skilled staff to administer current program services | \$12,100 |

2012 Plan

Program Base Budget Adjustments

| Activity/Responsibility | Reason for Adjustment | Service Level | Department Objective | Cost |
|-------------------------|--|--------------------------------|---|----------|
| Customer Service | Increase base budget for inflation and merit impact on salaries and benefits | Maintain current service level | Ensure appropriate skilled staff to administer current program services | \$14,600 |