



**Date:** November 28, 2022

**To:** Mayor and Council

**Author:** John Norton

**RE:** Customer Service Review Update

**Report No.:**

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## **RECOMMENDED ACTION**

1. That the following customer service standards **BE ADOPTED:**
  1. *We will treat you in a professional and respectful manner.*
  2. *We will treat you fairly while complying with all our policies, by-laws and regulations.*
  3. *We will provide service in a responsible, efficient and timely manner.*
  4. *We will acknowledge initial receipt of your correspondence within two business days.*
  5. *We will ensure our services are accessible for all of our customers.*
  6. *We will identify ourselves to you by using our first name and position title (where applicable);*
2. That the following implementation plan for providing better customer service to residents **BE ADOPTED:**
  1. That the primary source for intake of service requests be a new email address [Requests@Kingsville.ca](mailto:Requests@Kingsville.ca) or the Town's phone line at 519-733-2305;
  2. That every department utilize a tracking system for service requests and work orders;
  3. That customers be provided with a tracking number that corresponds to the request;
  4. That service requests be responded to by staff based on whether the request is (i) an emergency or matters affecting safety of persons and property or (ii) the order in which the request is received. Staff shall not prioritize requests based on "who" is making the request; and
  5. That a new Customer Service position be included for consideration in the 2023 budget, to assist with communication directly to residents and to assist departments with tracking and prioritization of customer requests; and,
3. That Administration **BE DIRECTED** to contract call centre services for after-hours support, following our purchasing by-law.

## **BACKGROUND**

In 2020 Council created priorities for the remainder of its term, from 2020 to 2022, and identified Customer Service as its highest priority.

On June 27, 2022, Council received a report from Janice Forsyth after completion of a customer service review which included Council consultation, a survey with residents, meetings with stakeholder groups, employee engagement and oversight from an employee committee.

Customer service training and discussion was held with all Town employees.

Council then directed Administration to bring back a further report to adopt the Customer Service Standards recommended in the consultant's report, including an implementation plan, and 2023 budget implications.

## **DISCUSSION**

### **The Scope of this Customer Service Review**

"Customer Service" in the context of this report is defined as professional and timely responses and communication toward the Town's customers (residents, visitors, user groups, etc.).

Customer service is different than "Service Levels", which is determined separately as the services the Town provides (and does not provide) and the level or amount of service the Town is able to provide based on budget and staffing levels. It is important to distinguish between "Customer Service" and "Service Levels" since the two are different, although interconnected. The scope and focus of this customer service review was upon improving the "Customer Service" experience and this is different than improving "Service Levels" across the organization.

In order to fulfill the Customer Service standards recommended for adoption, Council was advised that customer service improvements were required within each operating department. Customer service improvements have begun but will be an ongoing process requiring continued attention by senior management.

This report is to provide Council with an update on work that has been done to date and work that will be ongoing. This report also identifies the additional resources required and recommended to achieve better customer service.

### **Five Major Issues affecting Customer Service**

Administration has identified five major barriers affecting Customer Service at the Town of Kingsville.

## 1. Intake

Intake of service requests is an opportunity for Town staff to show that the Town is willing and able to receive service requests and constructive complaints. Submitting a request should be made as easy as possible for residents. Each request for service should be acknowledged and assigned a tracking number so that it can be tracked for follow up.

Intake is an opportunity for staff to appropriately identify whether a request is a high or lower priority request and then assign it appropriately to a department for review and response.

The current system of receiving and inputting service requests is confusing for some members of the public since there are multiple gateways for submitting a service request and no way to track verbal requests or the resolution of the request.

When reporting an emergency after-hours, residents are currently directed to several numbers, depending on the emergency type (Union Water, OPP, or Hydro One). This process is frustrating, time-consuming, and may not address all urgent issues.

## 2. Tracking

Every department of the Town needs an appropriate system for tracking service requests. Technology assists in providing a system that allows for the efficient and effective tracking of service requests. A tracking system is especially important for those departments that receive more requests for service than they can quickly and easily address. In some instances, departments have become overwhelmed by the number and complexity of service requests and are inadequately able to address, respond back, or track these requests over time. Not all departments have been able to utilize technology (software and/or hardware) to assist in tracking customer service requests.

## 3. Prioritization

The appropriate identification and triaging of service requests is critical for determining priorities. Emergencies and matters affecting safety of persons and property should be identified as needing higher priority than other service requests. These higher priority requests may need to be responded to immediately.

Other types of service requests that are not an emergency, or affecting safety of persons or property, should be treated in the order in which they are submitted.

The order in which service requests are treated should not depend on who submitted the request or who has followed up to see if it is appropriately logged into the system. Requests for service, especially where the department has a high volume of similar requests, can take considerable time and much longer than the public might anticipate.

Often members of the public will reach out to elected members of Council, or senior administration, to ask about their service request. This follow up request is then brought forward to staff, sometimes directly to front line staff, for a response. In the past this has resulted in staff deciding to prioritize the request because of “who” is requesting the follow up. In turn, this means other requests fall further down the priority list and wait longer. This approach is both unfair and perpetuates the problem of having service request delays while potentially undermining the staff’s authority. This approach also prolongs the idea that “calling a Councillor” or “calling the CAO” is the only means to get a service request addressed. The result is that some service requests are significantly delayed in being addressed or are just never addressed where staff cannot keep up with the volume of requests.

#### 4. Workload

In some departments staff have been unable to keep up with their workloads, especially during times of the year which are seasonally busy for their particular department. This impacts both Customer Service and Levels of Service. If staff cannot complete their daily assignments then they have little or no time to respond to new requests for service, especially those that are outside the norm. Additionally, staff then have little or no time available to provide good customer service by calling and follow up with residents.

#### 5. Follow-Up

After a service request has been addressed, it is important from a customer service perspective that some follow up take place so that the customer is aware that the item has been addressed. The follow up should be polite, appropriate, and prompt. This follow up could be automated but is often best received by customers in the form of a personal phone call or at least an email.

At this time, departments with the longest list of service requests are struggling to provide follow-up feedback to residents. This is because they are focusing their efforts on just addressing the backlog of service requests. Additional resources are needed to provide better customer service follow up.

It is important to note that not all service requests can be addressed to the satisfaction of the customer. Sometimes the request cannot be addressed because it is outside the jurisdiction of the Town or is beyond the Town’s ability to provide the level of service being requested, based on current budgeting and staffing levels. Regardless, the resident deserves a response to the request that is polite and appropriate, even if when the result is not to the resident’s satisfaction.

## **Customer Service across All Departments**

To improve the customer service experience at the first point of contact, the Senior Management Team is currently reviewing and updating the reception protocols for responding to common inquiries. These protocols will improve the ability to cross-train front line staff to deliver clear and consistent messaging to our residents. Each department will be asked to prepare a 'Frequently Asked Question and Answer' guide, which will empower the Reception desk to address basic inquiries in one stop. These guides are expected to be completed in 2023 and then kept up to date by each department.

For more complex issues, Reception staff will have an up-to-date responsibility matrix to ensure issues are directed to the appropriate individuals on the first transfer. These improvements will require ongoing collaboration between front counter staff and operating departments to ensure they are properly maintained as services evolve and staff transition into different roles.

To improve service response after-hours, Administration proposes implementing an after-hours call service. This service will provide residents a single point of contact for ALL after-hour emergencies, enabling more proficient staff dispatch.

## **Rebranding of Customer Service**

There are currently a number of ways of submitting customer service requests. These multiple means of submitting a customer service request can be confusing. For example, [Kingsvilleworks@kingsville.ca](mailto:Kingsvilleworks@kingsville.ca) is the current email address for receipt of all service requests and customer concerns. In addition, the Town uses CityWorks software to track and manage some service requests, although not all. An online form has allowed the public to enter service requests directly.

The Town also uses other software in some departments which are specific and designed to track and manage customer applications and files. For example, CloudPermit is an online portal used to manage both planning and building files. Customers can access this portal themselves and track their applications in real time.

The differences and similarities between Kingsvilleworks and CityWorks, along with other client facing software, is confusing.

In order to streamline the process for customers, Administration proposes to launch a new access point for receiving customer service requests and concerns.

This new access point will be named [Requests@kingsville.ca](mailto:Requests@kingsville.ca). This email address, along with the Town's primary phone number of **519-733-2305**, will be the means of submitting customer service requests for all members of the public, members of Council, and all employees.

Our customers will be able to send service requests and concerns to [Requests@Kingsville.ca](mailto:Requests@Kingsville.ca)

## **DEPARTMENTAL RESPONSES**

### **Financial and Information Technology Services Department**

Financial and IT Services is responsible for the reception team at Town Hall. This team answers the phone, receives service request emails, and manages the initial intake of the majority of customer service requests.

Most departments will continue to use CityWorks as the primary tracking tool for external customer service requests. When a resident makes a request, staff will enter the request in Cityworks and provide the resident with a tracking number, which can be referenced if they need to follow up on the status of their request.

Over the next few weeks, the Manager of IT will meet with each department to review and update the automated work flows within Cityworks. This will ensure that service requests are properly prioritized and directed to the appropriate individuals for completion and follow-up. Staff will also receive additional training on the functionality of the Cityworks program.

One of the projects included in the 2022 budget and currently underway is equipping field staff with tablets and other technology to receive and close out work orders in the field as they are completed. Moving to a paperless work order processing system should reduce the overall time required to complete work orders and improve status tracking.

Information Technology will consider and prioritize other recommendations noted in the Customer Service Review as it prepares its 2023 budget. This includes potential upgrades to the phone system and website enhancements.

### **Infrastructure and Engineering Services Department**

An engineering technician was recently hired into the department. This increase in staff will provide for a number of benefits relating to improved Customer Service and improved Levels of Service. This position will be responsible for processing encroachment permits which will reduce the turnaround time for customer approvals. Further, this position will be able to provide in-field instructions prior to new driveways being poured. This service will improve communication to the customer, reduce the number of improper driveway installations, and reduce the number of forfeited security deposits, all of which should contribute to a more efficient interaction with the Town for customers. The engineering technician will also be responsible for administering the Town's infrastructure indemnity program which will expedite required inspections ultimately reducing the amount of time it currently takes for residents to

reclaim their security deposits. Finally, the Town will have a more prominent presence on active construction projects as the engineering technician will provide in-field supervision. This will give residents with concerns the opportunity to speak to a Town representative on-site and in person.

In 2022, the IES Department added full-time employees in both Public Works and Environmental Services. This allowed for faster work order response times, improved infrastructure maintenance, and additional support for community events.

The Director of Infrastructure and Engineering Services created the backyard subsidy program to help support residents with rear yard drainage issues.

The Department implemented automated responses when certain work orders are completed and closed.

The Department has initiated the use of several fillable online forms for Water Service Application, Tree Planting, Sewage Contractor Application, etc.

### **Legal, Building and By-law Services Department**

In the summer of 2022 the backlog in building permits was growing and becoming problematic. On June 28, 2022, the Building Department hosted a meeting of developers, builders and other stakeholders to discuss the increased backlog in processing building permit applications due to greater demand and decreased staffing levels. A path forward to address the backlog was presented and was well received. Developers and builders provided input on how the “Cloudpermit” experience could be improved. The Building Department then met with the Town’s Cloudpermit representative and enhancements have been implemented to improve functionality and address the concerns raised by developers and builders. Cloudpermit has also been modified to send an immediate notification acknowledging the receipt of a building permit application to meet the Customer Service Standards.

A permanent Building Inspector and a temporary Building Inspector have been hired to help address the backlog in processing building permit applications. The Building/Planning Technician position that was approved in the 2022 budget has now been filled and will further help decrease the permit processing times.

Currently the department has one By-Law Enforcement Officer and there is a delay of approximately six weeks to respond to the high volume of by-law complaints.

The Town’s two lawyers provide legal services exclusively to The Corporation of the Town of Kingsville and not to external customers. Heavy workloads and competing priorities, however, can result in delays finalizing contracts and agreements with external entities or delays providing advice to internal departments which creates delayed response times to customers. The Legal team continually reviews priorities and adjusts work accordingly.

## **Community and Development Services Department**

Significant changes were made in the Planning Services team in 2022, in part, to improve planning collaboration internally and provide clear, consistent responses on planning applications. In addition, the Building and Planning Technician position, approved in the 2022 Budget, has been filled and will be assisting both building services and planning services to complete initial plans reviews, and zoning compliance checks which will expedite review processes.

These changes have also led to the launch of CloudPermit for planning applications (Site Plan Agreements, Zoning By-Law Amendments) to facilitate submission, review and approvals of planning applications. CloudPermit allows the applicant to stay current on progress related to the file, track and respond to questions raised by Administration, submit required documents in support of applications, and facilitates the role of the Technical Advisory Committee in reviewing and providing comments and 'sign off' on applications. In 2023, Planning Services will explore the use of CloudPermit for Consent and Minor Variance applications as well. CloudPermit is an essential tool to ensure Planning Services can meet provincially mandated review timelines and importantly, ensure that applicants receive timely responses to their applications.

With the relocation of Planning Services to the Arena, the full Community and Development Services Department are in one location which allows more timely direction and action in response to customer inquiries, complaints, or other matters. Protocols have been established with Town Hall customer services staff to facilitate information gathering and response and reduce potential customer frustrations by having to be redirected to Arena. Planning and Building Services have similar protocols in place to expedite zoning and review of planning/building applications to ensure efficient review and approvals.

Three part-time parks and recreation administrative positions were split into one full-time Programs and Events Assistant, and one full-time Facilities Clerk. Previously, three positions had interests in all aspects of the Parks and Recreation/Programs and Events files, which made customer and file continuity challenging. Creating two Full-Time positions has allowed each position to focus on a specific area to provide consistent responses to questions, and provide improved customer service by being the primary contact for their area of responsibility. This has allowed us to deliver new programs, facilitate park and facility rentals, respond more timely and accurately in response to customers, improve communications with the community, and provide consistency on agreements with park and recreation user groups in keeping with Town policy.

Parks and Recreation vehicles have been equipped with maintenance tools to allow staff to attend to minor maintenance in parks when they are on-site rather than require additional site visits. Where appropriate, staff have been assigned to key sites (e.g. Marina, Cottam parks) to ensure more timely response to site issues. Parks and



Recreation are also working with IT to equip staff with resources to more effectively manage day-to-day assignments, maintenance, and respond to work orders.

### **Fire and Rescue Services Department**

Fulltime staff have been briefed on phone answering protocol and responding to emails in a timely manner.

The Department has a planned training session on customer service in relation to emergency response, public relations and general day-to-day duties.

The Department developed a “how to instruction sheet (available at the entrance to Fire Department admin) to assist residents with instructions to complete the online open burn permit. The online open burn permit system is set to send “please come back” notifications when the annual permit expires reminding residents to re-apply for future open burns.

The Department has initiated a follow up program where a fire prevention officer reaches out the next day to neighbours affected by a residential fire to answer any questions.

### **Chief Administrative Officer’s Department**

The CAO’s Department includes Human Resources, the Clerk’s Office, Communication and Economic Development.

The Clerk’s Office has increased accountability and transparency by implementing meeting efficiencies over the last year. The team has also committed to posting meeting video to the website immediately following each council meeting.

The Clerk’s Office has implemented new standard operating procedures for dog registration which has improved service in this area. The Clerk’s Office has also cross-trained staff in the department to ensure an optimal customer service experience and continues to look for efficiencies within the department that will enhance the customer service experience.

Communications has invested in improving the organization’s website and digital properties to ensure community members have convenient access to the information and self-service options they seek 24/7. Communications is looking to enhance consultation with the community utilizing new web-based technologies.

### **FINANCIAL CONSIDERATIONS**

The estimated cost of a third party, after-hour call service is estimated at approximately \$5,000 annually. If approved, this will be incorporated into the Town’s 2023 operating budget.

The cost of an additional Customer Service representative to assist with communication to residents and to assist departments with tracking and prioritization of customer requests would cost approximately \$80,000 annually, including pension and benefits.

## **ENVIRONMENTAL CONSIDERATIONS**

Not applicable

## **CONSULTATIONS**

Customer Service Committee  
Senior Management Team

PREPARED BY:



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John Norton  
Chief Administrative Officer

## **LINK TO STRATEGIC PLAN**

Strive to make the Town of Kingsville a more accessible community.

Effectively manage corporate resources and maximize performance in day-to-day operations.

## **Link to Council 2021-2022 Priorities**

- ☐ COVID-19 and the health and safety of the community
- ☒ Customer Service: Training, Technology, Staff, Review Standards/Level of service
- ☐ Housing: Affordability (lot sizes, developer incentives, second dwellings, density, etc.)
- ☐ Greenhouse: lights & dark sky, odours (site plan compliance, bylaws, other tools)
- ☐ Programming Increase: Youth and Seniors
- ☐ A development plan for Downtown Kingsville / Main Street
- ☐ Financial savings: Schools closings, Migration Hall
- ☐ Economic Development: strengthen tourism/hospitality
- ☐ COVID - economic recovery
- ☐ Communications: Strategy – Policy (social media), Website refresh and other tools, Public engagement

- ☐ Housing: Migrant Worker Housing – Inspections (Building/Fire), regulate, reduce, or increase
- ☐ Committees / Boards: Review and Report
- ☐ Policy Update: Procedural Bylaw
- ☐ Economic Development: diversify the economy, create local jobs, industrial, Cottam
- ☐ Infrastructure (non-Municipal): Union Water expansion & governance
- ☐ Infrastructure (Municipal): Asset Management Plan update, the infrastructure funding deficit
- ☐ No direct link to Council priorities