

# **Tualatin Valley Water District**



**BOARD OF COMMISSIONERS  
1850 SW 170th AVENUE  
BEAVERTON, OR 97003**

## **WORK SESSION**

**TUESDAY, DECEMBER 1, 2015  
IMMEDIATELY FOLLOWING THE  
5:30 P.M. EXECUTIVE SESSION**

### **CALL TO ORDER – WORK SESSION**

*Marilyn McWilliams, President*

- 1 Announcements  
*Mark Knudson, P.E., Chief Executive Officer (CEO)*
- 2 Board Retreat Planning  
*Marilyn McWilliams, President*
- 3 Review of Commissioner Topics  
*Amy Heinlen, Human Resources Director*

### **ADJOURNMENT**

**Listening devices are available upon request 48 hours prior to the day of the meeting (503-848-3000).**



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**TUALATIN VALLEY WATER DISTRICT  
WORK SESSION AGENDA ITEM**

**MEETING DATE: DECEMBER 1, 2015**

**TITLE: REVIEW OF COMMISSIONER TOPICS**

**ITEM:** The Tualatin Valley Water District Board of Commissioners adopted Board Policy 1.10.160 to provide a framework for individual commissioners to submit topics for inclusion on the Board's agenda. In recent months, two topics have been proposed by commissioners. The first topic resulted from the testimony of a customer at the September 16, 2015 Regular Board Meeting. During his testimony, the customer urged the District to implement customer satisfaction surveys to improve customer service and accountability. Commissioner Doane suggested staff review this as a Commissioner Topic.

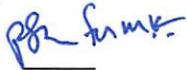
The second topic was raised at the November 18, 2015 Regular Board meeting where Commissioner Doane requested staff "Investigate the feasibility of granting paid leave for the two weeks that reserve members of the armed forces spend annually on duty". Staff has prepared an initial memorandum containing preliminary discussions for both topics. Staff will present the details of the memorandum to the Board and solicit guidance on interest for further action.

**BUDGET IMPACT:** This is an informational item only. Preparing responses to Commissioner Topics in accordance to Board Policy 1.10.160 is funded within the District's personnel services budget. Specific direction from the Board to adjust the District's policies would include detailed budget impact estimates.

**ADDITIONAL INFORMATION:** Paul Matthews, paul.matthews@tvwd.org, 503-848-3017; Brenda Lennox, brenda.lennox@tvwd.org, 503-848-3039; Amy Heinlen, amy.heinlen@tvwd.org, 503-848-3015; Liz Ohlmann, elizabeth.ohlmann@tvwd.org, 503-848-3042.

**ATTACHMENTS:** Technical Solutions for Customer Satisfaction Survey Memo and Feasibility of Granting Paid Leave for Two-Week Annual Training for Members of the Guard and Reserves Memo.

**APPROVING MANAGERS INITIAL:**

CHIEF EXECUTIVE OFFICER	<u></u>	HUMAN RESOURCES	<u></u>
FIELD OPERATIONS	<u>N/A</u>	WATER SUPPLY PROGRAM	<u>N/A</u>
FINANCIAL SERVICES	<u></u>	CUSTOMER SERVICES	<u></u>
ENGINEERING SERVICES	<u>N/A</u>		



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## MEMO

**Date:** November 24, 2015

**To:** Board of Commissioners

**From:** Mark Knudson, Chief Executive Officer

**Re:** Commissioner Topic Regarding Technical Solutions for Customer Satisfaction Survey

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### INTRODUCTION

At the Board's September 16, 2015 regular meeting, a customer testified as to a recent customer service issue he experienced at the Tualatin Valley Water District (TVWD). As part of the customer's testimony, he suggested TVWD use online customer satisfaction surveys to improve our business practices and hold staff accountable for poor customer service.

During the discussion, Commissioner Doane suggested this topic become a Commissioner Topic pursuant to Board Policy 1.10.160 (Method to Propose Agenda Items and Setting of Priorities for Consideration) and be presented at a future work session. Following TVWD's existing policy, staff presents this memorandum to the Board of Commissioners for consideration.

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### BACKGROUND ON ISSUE

As a result of the customer testimony, staff investigated both technical and non-technical solutions that might address the customer's concern. From these, staff prepared a short list of options that could be further investigated.

The customer's comments came at a fortunate time for TVWD. As part of the District's strategic initiative process, the District will be conducting a comprehensive project to develop a utility billing (UB) replacement strategy. TVWD's current UB system is an in-house system developed over many years. The most recent version of the UB system received a major upgrade in 2006-2007.

Since the development of the current UB, the utility billing industry has improved technologies that have increased options for managing relationship with customers and conducting customer service audits. Regardless of the outcome of this Commissioner Topic, staff will include customer satisfaction survey options in the upcoming UB strategy study.

Currently customer service representatives (CSR) close a customer call with *"Is there anything else I can help you with today?"* If the customer is unhappy or has a complaint the CSR offers to

forward the customer to a supervisor. If the supervisor cannot resolve it is elevated to the Manager of Customer and Support Services.

Also, survey cards are available for customers to comment on the service they have received. These cards are at the front counter and carried by Field Customer Service Representatives

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## **OPTIONS TO CONSIDER**

The options for consideration are organized in two categories: Non-Technical and Technical. Non-technical options can be implemented without significant changes to TVWD's UB system. Technical solutions, however, most likely require modifications or extensions to the UB system.

### **NON-TECHNICAL SOLUTIONS**

Below are some non-technical solutions that the Customer Service Department can implement without significant modifications or extensions of the current UB system.

#### **Inquire About Customer Satisfaction at Conclusion of Each Call**

Like many other business that provide telephonic customer service, at the conclusion of each call, the CSR taking the call can ask the customer if the service they received is satisfactory. The CSR could refer dissatisfied customers to a supervisor to receive a debriefing on the call.

#### **Modification of On-Hold Message**

The on-hold recording used on TVWD's phone system could be modified to inform customers of the option to speak with a supervisor should they be dissatisfied with the quality of service received from a CSR.

### **TECHNICAL SOLUTIONS**

The customer providing testimony at the Board meeting emphasized the need for technical solutions for customer satisfaction surveys. In particular, the customer mentioned the use of the online service "Survey Monkey" to gauge customer satisfaction. At the time of his testimony, the customer was apparently unaware of the District's customer satisfaction survey conducted by a professional polling firm using statistically significant samples.

#### **Survey Monkey**

Survey Monkey is a free or paid (often referred to as freemium) online service that individuals and businesses can use to create ad hoc surveys. To conduct a Survey Monkey survey, TVWD would need to provide the email address of the customer to be surveyed to the online service. In addition, TVWD would need to create a generic survey on the site that each customer would be directed to complete.

TVWD's current UB system does not track customer interactions in a way that could automate the creation of the necessary emails immediately after a customer interaction without considerable modification to the underlying program. Additionally, TVWD's UB system does not

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have the necessary functions to integrate the results of the Survey Monkey findings into a system that would facilitate management review.

The Survey Monkey solution would require acquiring the customer's email address with the assumption that the customer has a computer or access to a computer and an email address. Currently, only customers that have a login to the www.tvwd.org site have provided email addresses as part of their registration process. Email addresses are not required information for customer move-in requests.

It is important to note that some customers may have privacy concerns and be uncomfortable with third-party survey tools. Certainly there are customers that are familiar with tools like Survey Monkey, but other customers may find the process bothersome and some of the emails would likely be blocked by customer spam filtering. Additionally, some customers may be concerned with personal information being shared with a third-party service providers like Survey Monkey.

Although Survey Monkey has a free version available to the general public, a subscription service for TVWD would likely cost under \$800 per year. This estimate of the subscription cost does not include the significant cost associated with the modifications of the UB system to automate the use of Survey Monkey and the reporting of results.

#### **Follow-Up Email**

Our Customer Service Representatives could send selected customers an email requesting a response as to the level of customer service received. With significant modifications to the UB system, these emails could be automated for customers whose accounts are modified in certain ways. The results from the emails could be directed to a group mailbox that is reviewed by management for quality control.

This solution would, again, require acquiring the customer's email address with the assumption that the customer has a computer or access to a computer and an email address. This solution would require significant modifications and improvements to TVWD's UB system. In addition, management would need to marshal time to manually monitor all the emails to identify those emails that provide insight on quality issues.

#### **Automated Phone Survey at Call Conclusion**

This solution would require the implementation of a phone survey system. Options for this automation include presentation of customer information to a phone survey service provider or the purchase or upgrade of our current phone system to include this feature. In both cases, this would require redirecting staff and budget resources toward this effort.

This solution would require acquiring a phone number for the customer for the purposes of the survey. Currently, phone numbers are not required information for customer move-in requests.

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## STAFF RECOMMENDATION

The District is currently developing a strategy to replace its existing UB system. Part of developing that strategy includes identifying functional requirements for a new UB system. Staff recommends customer service quality monitoring be included in the functional requirements of the new UB system. The specific method of achieving the customer service quality monitoring will be determined by the available technologies, industry trends, and costs.

In the interim, the technical solutions outlined in this memorandum require significant investment in TVWD's existing UB system which is slated to be replaced in the coming years. Staff does not recommend further investment to enhance the existing UB system.

Acquiring additional information for automated responses to customer interactions requires additional resources in both staffing and budget. In addition, it delays the District's ability to respond to customer needs.

The approach that may be cost effective and feasible at this time is the simple inquiry about customer satisfaction by the CSR at the end of the call. If the customer is dissatisfied, the customer should be redirected to another CSR or, perhaps, a supervisor, to collect the information and perform a follow-up. This method would allow the Customer Service team to clearly identify any issue quickly and adjust their responses appropriately.

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## MEMO

**Date:** November 24, 2015

**To:** Board of Commissioners

**From:** Mark Knudson, Chief Executive Officer

**Re:** Commissioner Topic Regarding Feasibility of Granting Paid Leave for Two-Week Annual Training for Members of the Guard and Reserves

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### INTRODUCTION

At the November 18, 2015 Regular Meeting of the Tualatin Valley Water District, Commissioner Doane requested staff “investigate the feasibility of granting paid leave for the two weeks that reserve members of the armed forces spend annually on duty.” Staff prepared this memorandum to address this request as a Commissioner Topic pursuant to Board Policy 1.10.160 (Method to Propose Agenda Items and Setting of Priorities for Consideration). Following TVWD’s existing policy, staff presents this memorandum to the Board of Commissioners for consideration.

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### BACKGROUND ON ISSUE

The District currently has one known member of the reserve armed forces. This employee is an active member of the Oregon Army National Guard. Military duties for this employee varies from traditional monthly training meetings (often referred to as “drills”), annual trainings (generally two weeks per year), additional training (military courses oftentimes required for eligibility for promotion), activation for federal service, and other miscellaneous duties. Generally military orders are issued to the individual and/or military unit for these duties.

Federal and state laws protect employees from adverse personnel actions as a result of their military service. The District allows employees to take time off without pay; use accumulated vacation or comp-time earned; or a combination of these pay statuses during valid military leave. No employee is required to take vacation to fulfill his/her military duties.

House Bill 2763, signed by Governor Brown on April 22, 2015, allows public employers to supplement the military pay of reserve members of the armed forces. Prior to this bill, public employers were prohibited from offering differential compensation that would bridge the difference in pay while the employee was performing military duty. This law removed that prohibition effective immediately provided the compensation does not exceed the employee’s base salary.

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## **OPTIONS TO CONSIDER**

Offering differential pay is an option for the public employer; it is not a requirement. The new legislation appears to place a limit on the amount of the supplemental pay a public employer may provide to an employee fulfilling military duty. Based on the current understanding of the law, TVWD has two options. Each is briefly described below.

### **PROVIDE SUPPLEMENTAL PAY**

The District could adopt a policy to supplement the military pay of employees while on military duty. This policy and any procedures adopted would need to comply with HB 2763 and District policies and be fully vetted by the District's legal counsel.

These procedures would likely include steps similar to:

1. Require the employee to provide copies of military orders or signed affidavits from his/her commander providing the dates of military service and the military pay status of the employee.
2. Require the District to develop forms to allow the employee to submit a request for supplemental pay. This submittal would require disclosure of the amounts of military pay received by the employee and a request for a supplemental payment.
3. Engage the District's staff preparing the payroll to create a supplemental pay amount with appropriate taxes withheld.

### **MAINTAIN THE STATUS QUO**

The District is not required to provide supplemental military pay and could maintain its current policy.

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## **OTHER INFORMATION**

Staff does not have sufficient information to provide an estimated budget impact of a new policy. Currently, the District has only one known reserve member of the armed forces and the request for investigation from Commissioner Doane restricts supplemental pay for two weeks per year. Other administrative costs have not been factored into the analysis.

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