



Program: ServiceOakville

Program Based Budget

2013 – 2015

Program: ServiceOakville

Vision Statement:

To deliver citizen focused services that combine people, processes and technology to maximize value to the public.

Mission Statement:

To help the town achieve its goals and objectives by delivering services valued by the organization and the community; providing leadership in the implementation of the town's customer service strategy by working with other departments; and delivering accessible, integrated customer service solutions to the public.

Program Description

The ServiceOakville program currently provides switchboard and enhanced reception services, including limited payment acceptance, at the Town Hall main reception. The program is evolving into a one-window approach to customer service that will track and handle the majority of walk-in, email and telephone inquiries on behalf of departments. Staff will be equipped and trained to answer inquiries which are currently transferred to other departments. This will provide seamless customer service, improve the effectiveness and efficiency of service request distribution and provide new service level reporting.

Program Services

The program is divided into two areas:

- ServiceOakville operations provide customer service in the form of switchboard, main reception, and payment services at Oakville Town Hall.
- The development group is responsible for definition and execution of the customer service strategy, including the implementation of a customer relationship management system.

Staffing Overview

Program: ServiceOakville	2011 Approved FTE	2012 Approved FTE	2013 Capital Impact	2013 Base FTE Change	2013 Reallocation of Staff	2013 Total FTE	Net Change 2013 vs 2012
Services/Activities:							
ServiceOakville	5.6	6.6			2.7	9.3	2.7
Total ServiceOakville	5.6	6.6	0.0	0.0	2.7	9.3	2.7

As part of phase one of the ServiceOakville Implementation 1.7 FTE's have been reallocated from Infrastructure Maintenance and Parks and Open Spaces to create additional Customer Service Representatives. In addition, 1.0 vacant FTE from Corporate was used to create a permanent Knowledge Analyst position to manage corporate information from business units within the Customer Relationship Management (CRM) system and in the knowledge base used to support ServiceOakville.

Program Services Budget Overview

Program: ServiceOakville	2012 Restated		2013 Requested		Net Change 2013 vs 2012	Net Change 2013 vs 2012 (%)
	Gross Budget	Net Budget	Gross Budget	Net Budget		
Services/Activities:						
ServiceOakville	533,300	519,200	762,400	756,400	237,200	45.7%
Total ServiceOakville	533,300	519,200	762,400	756,400	237,200	45.7%

Note: 2013 economic increases for all employee groups with the exception of Fire and Transit unionized employees have been included in the Corporate Revenue and Expenses budget pending contract negotiations.

The ServiceOakville Program has increased \$237,200 or 45.7%. Phase one of the ServiceOakville implementation plan was initiated late in 2012 as a result the 2013 budget reflects the increased personnel costs required to operate this phase of the new service design. Funds related to the 1.7 FTEs reallocated from Infrastructure Maintenance and Parks were transferred from the respective budgets. Overall, the net impact to the town's budget is \$130,900 which includes the cost differential in staffing costs, increased benefit costs, reduction in internal transfers and minor increases for other operational costs.

Level of Services Offered

- Municipalities are at varying stages in the implementation of a centralized customer service model which makes comparison very difficult. They range from full 311 telephone and service desk consolidation, to centralized desk service, to just beginning cashiering centralization.
- Those organizations with fully mature implementations have established call handling service levels, and report regularly on their service level attainment and KPIs.
- Services provided by Oakville are consistent with standard municipal practice, but does not meet the standard of mature service implementations.
- The effectiveness and efficiency of these services is reviewed through the town's performance-based, program based budgeting process.

Key Objectives (Initiatives) for 2013 - 2015

ServiceOakville's scope of operations will be enhanced to become a fully consolidated customer care centre, handling the majority of walk-in, email and telephone inquiries on behalf of customer facing departments. This will meet the town's strategic goal of providing outstanding service to our residents and businesses by:

- Responding to customer needs in a coordinated and timely fashion by reducing duplication and eliminating frustrating searches for the right person to address a specific concern.
- Measuring customer service volume and effectiveness.
- Providing timely and comprehensive reports on the quantity and nature of citizen concerns using a Customer Relationship Management (CRM) system.
- Allowing the town to meet increasing demands for services more efficiently and effectively as the town continues to grow.

Key Outcomes

- To support Council's strategic priority to continuously improve programs and services across the town, ServiceOakville has established approved service levels and will measure the level of attainment. Initial results will be reported for those services migrated to ServiceOakville in 2012. Work will continue in 2013 to migrate additional departments. The 2013 Citizen Survey will measure customer satisfaction with town service, and access to first contact resolution.

2013 Program Budget Drivers

	2012 Restated Budget	2013 Base Budget	2013 Capital Impact	2013 Budget Efficiencies	2013 Requested Budget	\$ Change From 2012	% Change From 2012
EXPENSES:							
Personnel Services & Benefits	500,800	725,400	0	0	725,400	224,600	44.8%
Materials & Supplies	7,500	7,600	0	0	7,600	100	1.3%
Capital Out Of Operations	0	0	0	0	0	0	0.0%
Purchased Services	25,000	28,200	0	0	28,200	3,200	12.8%
Internal Expenses & Transfers	0	300	900	0	1,200	1,200	0.0%
Total EXPENSES	533,300	761,500	900	0	762,400	229,100	43.0%
REVENUES:							
External Revenues	7,500	6,000	0	0	6,000	(1,500)	(20.0%)
Internal Recovery & Fund Transfers	6,600	0	0	0	0	(6,600)	(100.0%)
Total REVENUES	14,100	6,000	0	0	6,000	(8,100)	(57.4%)
TAX LEVY	519,200	755,500	900	0	756,400	237,200	45.7%

Note: 2013 economic increases for all employee groups with the exception of Fire and Transit unionized employees have been included in the Corporate Revenue and Expenses budget pending contract negotiations.

In 2013, the ServiceOakville Program has increased \$237,200 or 45.7%. The main drivers for the increase are the following:

- Personnel Services & Benefits have increased \$224,600 or 44.8%. This is primarily driven by the need for increased Customer Service reps and the Knowledge Analyst required to support the ServiceOakville program. As noted above, funds have been reallocated where available.

- Purchased Services have increased \$3,200 or 12.8% as a result of increases in skills improvement for new staff.
- Internal Expenses & Transfers have increased \$1,200 due to the addition of five wireless radios as a part of the wireless radio capital project.
- External Revenues have decreased by \$1,500 or 20% as a result of a decline in town souvenirs.
- Internal Recoveries & Fund Transfers have decreased by \$6,600 as tax stabilization reserve funding was used in 2012 to smooth the impact of the program. These funds have been removed in 2013.

2014 - 2015 Expenditure Summary

	2013 Requested Budget	2014 Forecast Base Budget	2013-2014 Change (%)	2015 Forecast Base Budget	2014-2015 Change (%)
GROSS EXPENDITURES					
ServiceOakville	762,400	952,100	24.9%	1,138,100	19.5%
Total GROSS EXPENDITURES	762,400	952,100	24.9%	1,138,100	19.5%
TAX LEVY					
ServiceOakville	756,400	767,400	1.5%	778,700	1.5%
Total TAX LEVY	756,400	767,400	1.5%	778,700	1.5%
GROSS EXPENDITURES by Type					
Personnel Services & Benefits	725,400	911,600	25.7%	1,097,300	20.4%
Materials & Supplies	7,600	7,900	3.9%	7,900	0.0%
Purchased Services	28,200	31,400	11.3%	31,600	0.6%
Internal Charges	1,200	1,200	0.0%	1,300	8.3%
Other Expenditures	0	0	0.0%	0	0.0%
Minor Capital & Transfer to Reserves	0	0	0.0%	0	0.0%
Total EXPENDITURES	762,400	952,100	24.9%	1,138,100	19.5%
REVENUES by Type					
Activity Revenue	6,000	6,000	0.0%	6,000	0.0%
Internal Recoveries	0	0	0.0%	0	0.0%
Grants	0	0	0.0%	0	0.0%
Other Revenue	0	178,700	100.0%	353,400	97.8%
Total REVENUES	6,000	184,700	2,978.3%	359,400	94.6%
TAX LEVY	756,400	767,400	1.5%	778,700	1.5%

Note: 2014 and 2015 economic increases for all employee groups with the exception of Fire and Transit unionized employees have been included in the Corporate Revenue and Expenses budget pending contract negotiations.

2014 - 2015 Budget Forecast Highlights

- The 2013 and 2014 forecast includes increased staffing requirements as future implementation phases of ServiceOakville have been planned. Tax Stabilization reserve funding has been used in those years as an interim measure until efficiencies are identified.

2013 Recommended Capital Budget

In 2013, additional funds are required in capital as service consolidation work with departments continues.

	TOTAL Gross Cost	PROGRAM SPECIFIC FINANCING					CORPORATE FINANCING				TOTAL Proposed Financing
		Development Charges	Equipment Reserves	Gas Tax Funding	Other Reserves	Funding Grants and Other Revenues	Local Infrastructure Reserve	Capital Reserve	Operating Contribution	Long Term Financing	
ServiceOakville											
36100907 ServiceOakville	525,000								525,000		525,000
Total ServiceOakville	525,000								525,000		525,000