

Customer Service Task Force Report on June 21, 2018 Action Planning Exercise



Customer Service Task Force

Report on June 21, 2018 Action Planning Exercise

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Introduction

The objective of the Customer Service Task Force is to identify actionable improvements to CAP customer service processes. The focus is on processes, not specific outcomes, although improved processes will produce higher quality outcomes with better transparency, understanding and buy-in. After robust outreach to stakeholders, the Task Force identified several areas of focus. At the June 21, 2018 meeting, the Customer Service Task Force conducted an action planning exercise to identify desired outcomes and possible actions for each of the areas of focus selected by the Task Force:

1. Empowering Committees
2. Improving Meeting Structure
3. Engaging All Perspectives

Note: Tools to assist with improvements in the fourth area of focus, Listening to Connect, were presented earlier in the meeting. Since this area relates to all the other areas, there was not a specific breakout session on this topic. Throughout the report below, ideas that relate to the Listening to Connect focus area are marked with an asterisk (*).

A. Meeting Process Summary

Task Force members, staff and stakeholders participated in breakout groups to focus on each of the three focus areas. Groups were asked to brainstorm potential action ideas related to their focus area.. Below is a summary of what was discussed in each of those groups. After the breakout sessions, each of the group leaders did a short report, and those presentations are summarized below as well.

Every effort was made to capture the ideas that were proposed at the meeting in full (see Section C). In an effort to clarify ideas, some context has been added and similar ideas have been combined. The flips charts used at the meeting are included at the end of the report for reference (see Section E).

B. Common Action Plan Themes from Breakout Group Brainstorming

It was noted by participants that there were a number of similar action plan ideas identified by more than one breakout group. These common themes are listed below and highlighted in Section C by breakout group – each idea is highlighted in a separate color for easier viewing. It was also noted that, in selecting which action plans to implement, the Task Force may consider that selecting some of these common items can satisfy multiple goals.

Create way for stakeholders to provide comments and ask questions online (electronic blue cards)
Create more trust by Board for work done in Committees
Conduct more discussions with stakeholders before Board meetings, include their perspectives in Board briefs
Give more advance notice of issues that will be considered by the Board
Create a Stakeholder Advisory Group
Invite stakeholders to participate in roundtable discussions

There was also discussion about “low hanging fruit,” items that could be implemented fairly easily, such as offering CAP classes and tours for interested stakeholders.

C. Breakout Group Brainstorming Idea Summary

Empowering Committees

Board member Sharon Megdal facilitated this group, along with consultant Jeanne Schulze. Bridget Schwartz-Manock assisted with notes. The group brainstormed ideas into the following categories.

As a reminder, the highlighted items represent ideas that were identified in multiple breakout groups, and asterisks () indicate items related to the Listening focus area.*

Stakeholder Input into Agenda Formulation <ul style="list-style-type: none">• Stakeholders and customers suggest agenda items• Stakeholders engaged more at committee level
Interactive Meeting Process <ul style="list-style-type: none">• *Invite stakeholders to participate in round table discussions• More task forces and technical work groups• Not hierarchical, even keeled• Public advisory group
More Stakeholder Input <ul style="list-style-type: none">• *Active input from stakeholders• *Online comments at Board and committee meetings, for questions
More Members Increase Buy-in <ul style="list-style-type: none">• More Board members on each committee• Assign more items to committees• Board trust work done in committees
More Time in Committee <ul style="list-style-type: none">• Two-step process in committee for important issues• *Additional discussion time with stakeholders• Follow up – dig deeper between steps, before Board• Informative reports/summaries on committees to all Board members

Improving Meeting Structure

Board member and Task Force Co-Chair Ben Graff facilitated this group, along with consultant Diane Janovski. Katosha Nakai assisted with notes. The group brainstormed ideas into the following categories.

As a reminder, the highlighted items represent ideas that were identified in multiple breakout groups, and asterisks () indicate items related to the Listening focus area.*

Balanced Info and Presentations
<ul style="list-style-type: none">• *Verify impacted stakeholders were consulted, increase staff outreach• Have staff report on stakeholder perspectives
<ul style="list-style-type: none">• *Be inquisitive on customer perspectives, request stakeholder testimony• New checklist for staff reports/ recommendations
<ul style="list-style-type: none">• Public advisory group reports
<ul style="list-style-type: none">• *Have more non-CAP presenters at meetings• Thoughts on two-step review policy• Feedback to staff at Board meetings should be constructive only
Enable Participation
<ul style="list-style-type: none">• Alert stakeholders on important issues before posting agendas
<ul style="list-style-type: none">• *Stakeholders comment on reports before meetings
<ul style="list-style-type: none">• *Electronic blue card process – can start before Board meeting• Pre-“voting” process with ground rules like Legislature (visible to all)• *Timing for audience input
Meeting Length /Efficiency
<ul style="list-style-type: none">• Stay on topic• Keep non-action items short
<ul style="list-style-type: none">• More trust for committee work
<ul style="list-style-type: none">• Controversial issues not in a Committee need to be addressed by a Task Force• Audience needs an opportunity for lunch; meetings are too long to go without lunch• Time-consuming questions by Board members should be asked prior to Board meeting• Board members more prepared before meeting
Technology
<ul style="list-style-type: none">• Online access to ask questions during meetings• Provide Board members with technology to allow phone participation without feedback, background noise, etc.• Change policy – if remote participants have technical disruptions, they are dropped
Behavioral/Listening
<ul style="list-style-type: none">• *Customer service training for staff twice a year
Room Logistics
<ul style="list-style-type: none">• Separate table for representatives of stakeholders/DWR• Remove General Manager from dais

Engaging All Perspectives

Board member Mark Taylor facilitated this group, along with consultant Greg Crook. Crystal Thompson assisted with notes. The group brainstormed ideas into the following categories.

As a reminder, the highlighted items represent ideas that were identified in multiple breakout groups, and asterisks () indicate items related to the Listening focus area.*

Stakeholder Input
<ul style="list-style-type: none">• Staff reports on customer engagement/perspective with each agenda item• *Greater staff interaction between CAP and cities (meet with mayors, annual sit downs, water resources meetings)• *Board members attend stakeholder meetings (AMWUA, tribal meetings, etc.)• Be able to un-compartmentalize efforts to facilitate making progress on more than one item at a time (appreciate that staff is very busy)• Presentations from stakeholders• *Roundtable discussions instead of dais and audience• City staff to do annual letters to CAP outlining concerns and achievements
Listening with Respect
<ul style="list-style-type: none">• Fewer PowerPoint presentations at stakeholder meetings• *Listen to understand, reflect what has been said• Board member office hours• Record issues identified/discussed• CAP 202 classes for interested stakeholders• Cities invite CAP to budget meetings to better understand finances (empathy)• *"Double click" more• *Practice how to disagree with respect• *Practice thinking from "other" point of view
Ombudsman
<ul style="list-style-type: none">• 3rd party ombudsman• Stakeholder advisory group• Facilitator for difficult issues
Online Access
<ul style="list-style-type: none">• *Allow input from distance attendees• Include letters to the editor in CAP News• *Form a forum with stakeholder input, moderated by Public Affairs
Board Communication
<ul style="list-style-type: none">• Individual board members directed to coordinate with stakeholder groups• Teaching Committee to understand stakeholder issues
Training
<ul style="list-style-type: none">• Stakeholder tours and 101 class (invite Board)• Comprehensive staff training program• Process improvements on staff level
Early Warning
<ul style="list-style-type: none">• *Talk with and/or notify stakeholders before key issues are presented

D. Breakout Group Goals and Concluding Presentations

As the brainstorming breakouts concluded, each group began identifying goals for the outcomes they would like to see within a year. After the breakout sessions, each group leader gave a brief report on what was discussed in each group and the goals they identified. The goals for each group are included below, along with the PowerPoint slides used for the reports.

Empowering Committees

Goals for Outcomes

- Stakeholders feel they have been heard
- Stakeholders understand rationale
- Process integrity – respect, fairness
- Non-Committee Board members support, trust work of Committees

Group Leader Report Presentation

Action Planning Breakout: Empowering Committees

- Q3 2018
- Q4 2018
- Q1 2019
- Q2 2019
- Victory Complete - Stakeholders Feel They Have Been Heard and Understand Rationale, Process integrity respect and fairness. Non Committee Board members support and trust

Improving Meeting Structure

Goals for Outcomes

- Creation of a new balanced approach to staff recommendations, with a mechanism for staff to bring information from stakeholders to the Board (reach out to stakeholders in advance, including dissenting views in report, possible checklist or procedure, online portal for stakeholders to engage electronically)
 - More efficient communication between Board and staff to interface with stakeholders and avoid surprises
- Examination of meeting length and efficiency
 - General courtesies (food truck or structured lunch break, seating arrangements, Board member preparedness)
- Efficiencies through technology
 - Policy fix related to remote participation
- Behavioral listening change
 - Customer service training for staff

Group Leader Report Presentation

Action Planning Breakout: Improving Meeting Structure

- Creation of a new balanced approach to staff recommendations and incorporated in that approach is a mechanism for assisting staff to better bring that information from stakeholders out to Board as part of recommendation (in advance, invite dissenting views to be a part of the report out; possible checklist/procedure; online portal and way to register stakeholder engagement electronically)
 - Subset: More efficient communications stream with Board and staff to interface with stakeholders to avoid surprises for all parties
- Examination of Meeting Length and Efficiency
 - General Courtesies like food truck or structured lunch break, seating arrangements, Board member preparedness)
- Efficiencies through technology
 - Policy fix related to remote participation
- Behavioral Listening/Change
 - Subset: Customer Service Training for Staff

Engaging All Perspectives

Goals for Outcomes

- Streamline enhanced access to all board members via multiple points of contact (Q1.5)
- Early notification and mechanism for feedback (Q2)
- Collaborative decision-making process in policy making (Q3)
- Stakeholder concerns heard, understood and validated (Q4)
- Enhanced levels of trust and mutual understanding (Q4)

Group Leader Report Presentation

Action Planning Breakout: Engaging All Perspectives

Stakeholder Input
Listening w/Respect
Training
Early Warning
Ombudsman
Board Communication
Online Access

Action Planning Breakout: Engaging All Perspectives

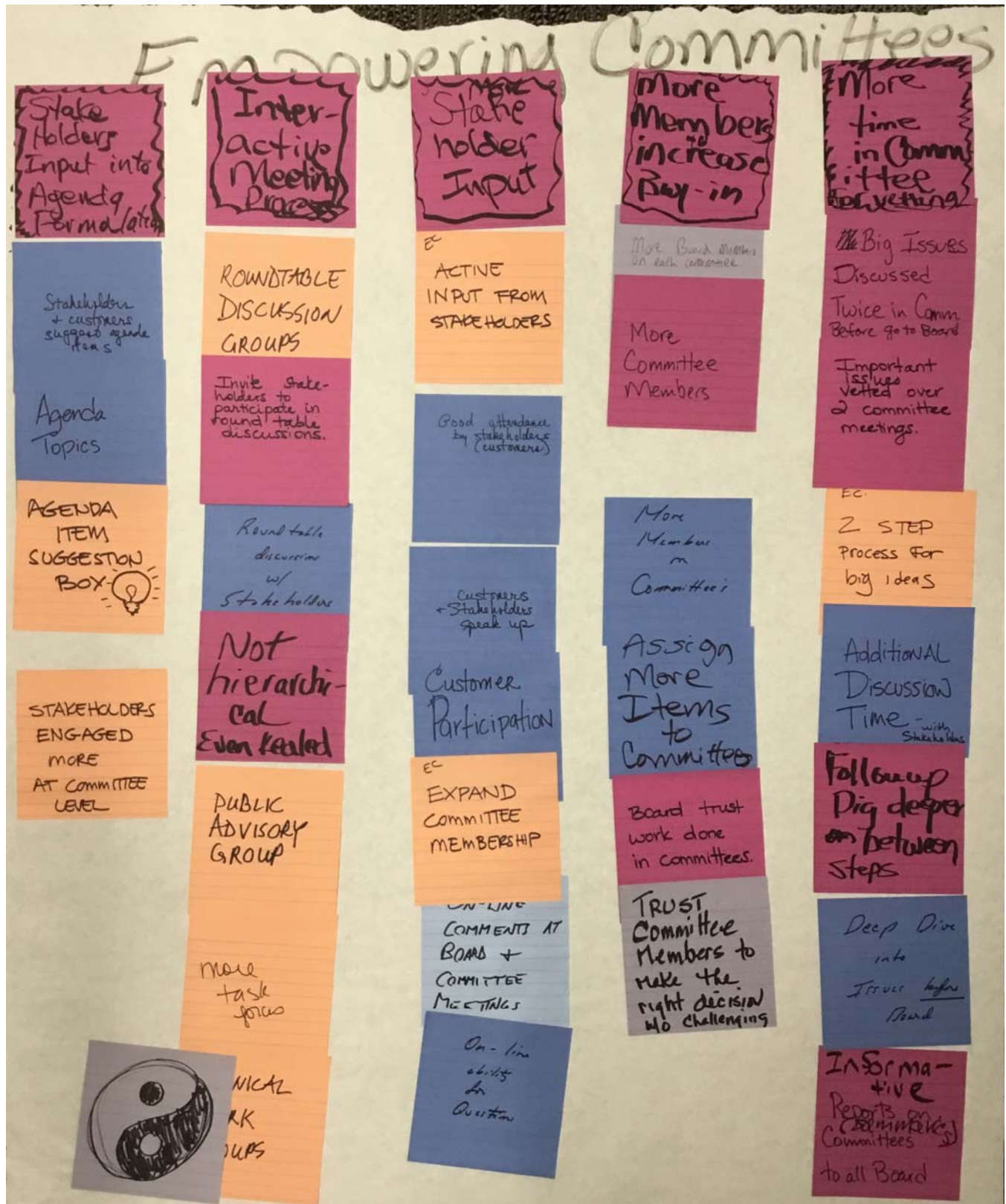
Outcomes

- Streamline enhanced access to all board members via multiple points of contact (Q1.5)
- Early notification and mechanism for feedback (Q2)
- Collaborative decision-making process in policy making (Q3)
- Stakeholder concerns heard, understood and validated (Q4)
- Enhanced levels of trust and mutual understanding (Q4)

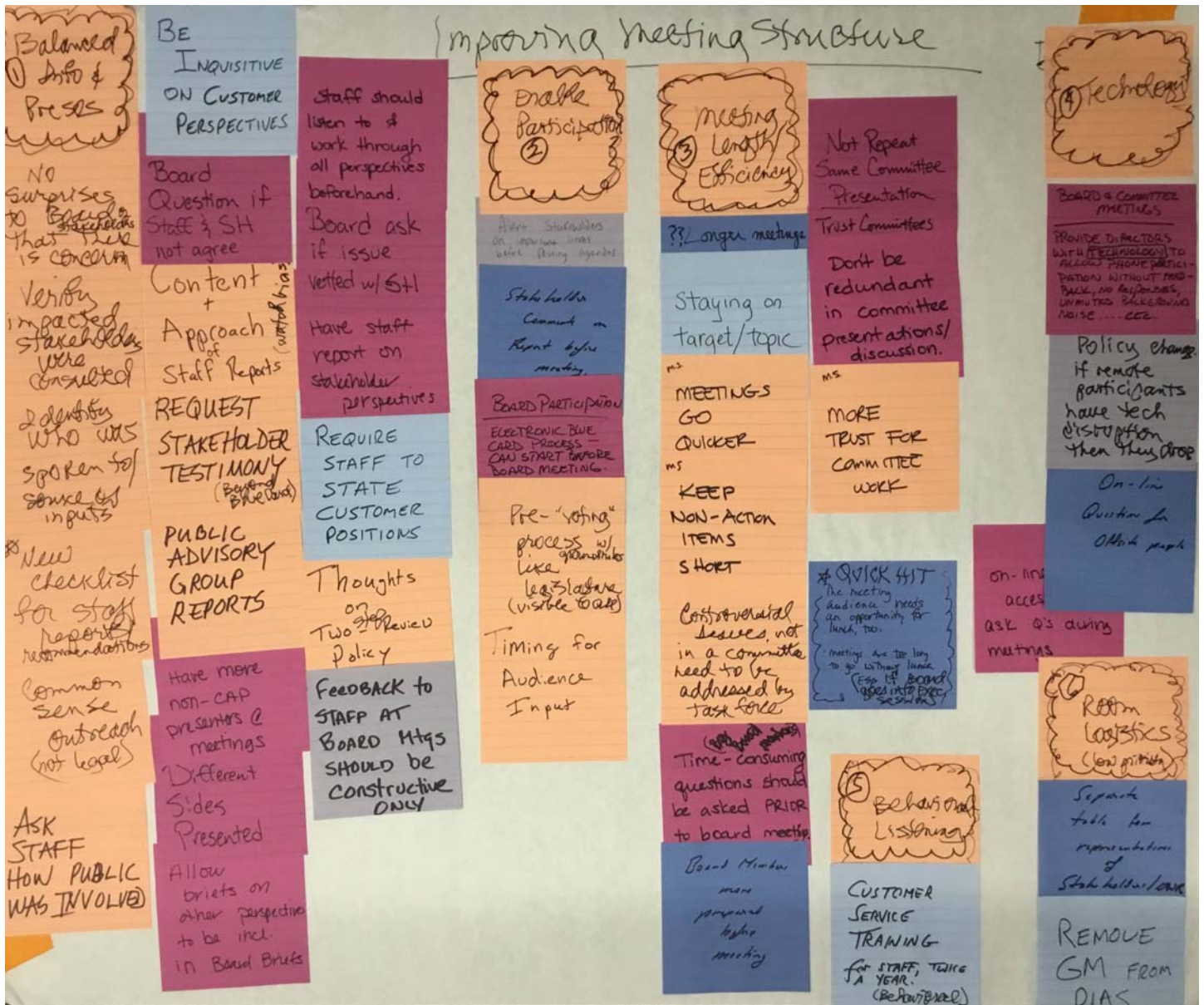
E. Appendix - Images from Task Force Meeting

The flip charts used in the breakout sessions are included here for reference.

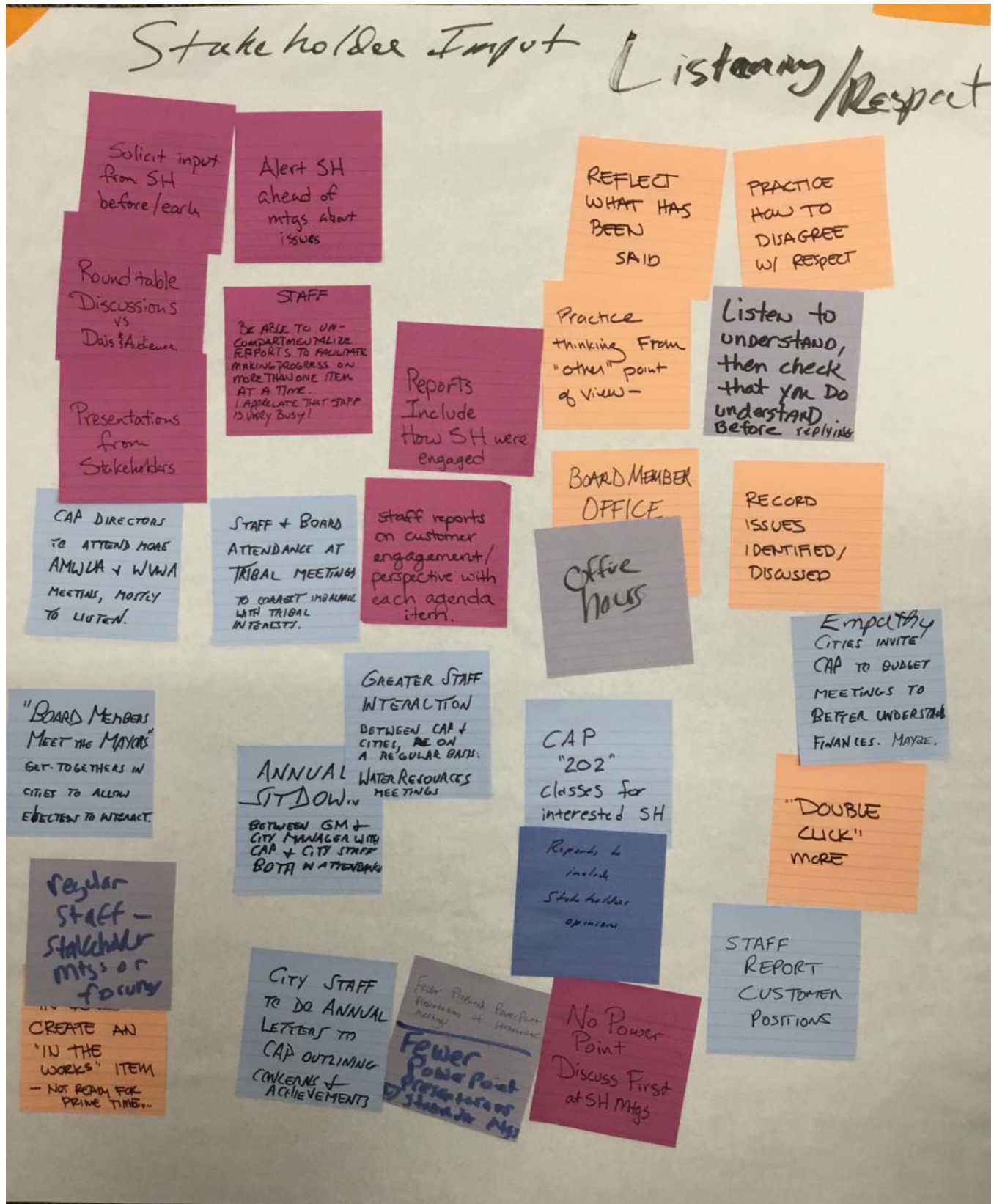
Empowering Committees



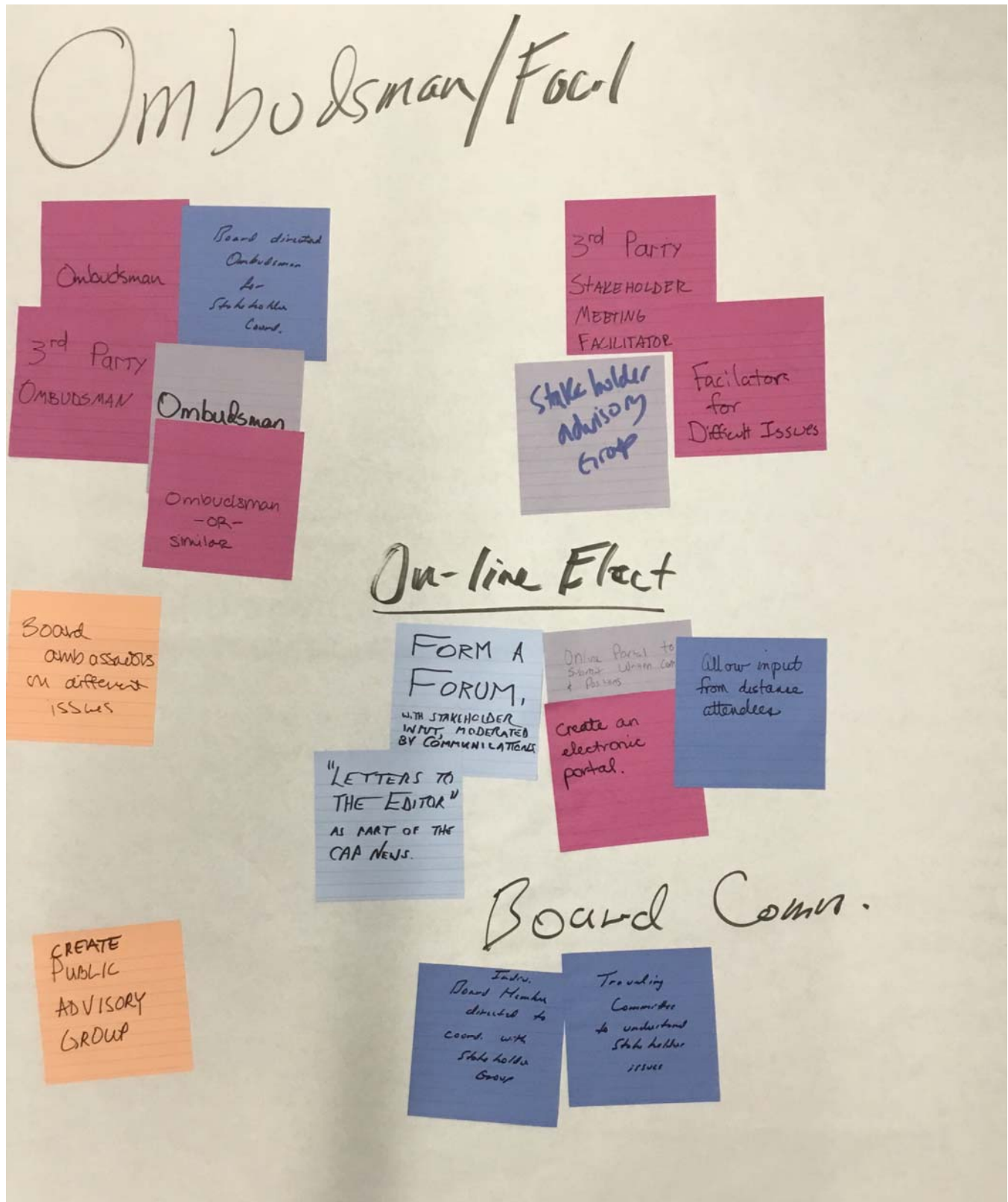
Improving Meeting Structure



Engaging All Perspectives



Engaging All Perspectives (continued)



Engaging All Perspectives (continued)

Engaging All Perspectives

Training

STAKEHOLDER
TOURS &
101 CLASS
• INVITE BOARD

Process
improvements
on staff
level

Comprehensive
staff
training
program

Early Warning

Create a
system where
all perspectives
are solicited
ahead of time.

Talk w/ SH
before key
issues are
presented

GIVE
ENOUGH
NOTICE FOR
ISSUES

To give SHs notice
Have an
"upcoming
issues" Board
agenda item
(like GM's report
on Consent items)

Bad Idea

AP
SUNS
PICK
AYTON