A Case Study: Fostering A Culture of Service Excellence
City of Ottawa

ODNET Conference
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Objectives

This workshop will provide you with an opportunity to

1. learn a model of service excellence, an approach to designing, leading and implementing service excellence, innovative tools and an evaluation framework that can be incorporated into any service excellence or change journey.

2. discuss the challenges you face in leading and implementing change in your organizations and identify strategies to overcome them.

Agenda

1. Background
2. The Service Excellence Model
3. Strategy Highlights
4. Learning and Development
   • Service Excellence Leads Program
   • Integration, Impact and Action Evaluation Framework
5. Accomplishments
   • Service Ottawa
6. Reflections
7. Next Steps
8. Panel Presentation
9. Resources

Background
"We see a City….

...in which programs and services are designed wisely and creatively, in which we act in ways that clearly demonstrate we value the perspectives and time of citizens; ...in which City staff work to clear and ambitious expectations of performance and have the knowledge and the authority to do so; ...and in which City staff are truly proud of their jobs and the roles they play in serving the City and its citizens."

Background: Why is Service Excellence important for the City?
In 2007, City Council established a mandate for the period of 2007-2010. This mandate included three transformation and six service priorities, identified in the table below:

<table>
<thead>
<tr>
<th>Transformation Priorities</th>
<th>Service Priorities</th>
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<tbody>
<tr>
<td>• Governance</td>
<td>• Transportation</td>
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<td>• Service Delivery</td>
<td>• Transit</td>
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<td>• Sustainable Finances</td>
<td>• Infrastructure Renewal</td>
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<tr>
<td>• Transportation</td>
<td>• Solid Waste and the Environment</td>
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<tr>
<td>• Transit</td>
<td>• Planning and Growth Management</td>
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<td>• Infrastructure Renewal</td>
<td>• Sustainable, Active and Healthy City</td>
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To achieve and sustain the transformation priorities, the city’s senior management team created a We See a City Service Excellence Vision (May 2008), which sets forth a service excellence vision for the City.
The City of Ottawa’s Service Excellence Framework is built on the following premises:

- An improvement in employee engagement will produce a corresponding improvement in operational performance and vice versa (reciprocal relationship).
- An improvement in employee engagement will produce a corresponding improvement in customer satisfaction and vice versa (reciprocal relationship).
- There is a direct relationship between operational performance and customer satisfaction.
- Client satisfaction has a limited influence on the public confidence and trust in the City of Ottawa municipal government.

The research tells us that:

- There are a number of key drivers that influence each of the variables (employee engagement, operational performance and client satisfaction) of the value chain.
- Each of the drivers can be measured – to determine a baseline and demonstrate a change.
- Improvement strategies can be identified and prioritized based on quantitative measurement of the drivers.
- Improvement strategies for any of the variables can produce service improvement results.
- A continual measurement strategy and approach can create sustained change in a service excellence culture.
Employee Engagement is defined as the extent to which employees are satisfied with their jobs and are committed to their work and their organization.

**How do we achieve Service Excellence?**

**Drivers**
1. Career path that offers opportunities for advancement
2. Fair pay and benefits
3. The perception that the employer provides good value to clients
4. A satisfactory work environment
5. Employees understand and value how their work impacts the customer
6. A positive perception of senior management
7. Leadership development

**Operational Performance**
Consists of those operational processes and service delivery mechanisms that allow for the delivery of government services.
How do we achieve Service Excellence?

Drivers

1. Defined service levels endorsed by Council and informed by citizens
2. Informed decision-making and effective management practices
3. Clear internal/external communications about service levels, operational performance and improvement priorities
4. Service delivery processes aligned with service levels
5. Appropriate investment in capital assets and supporting technology
6. Capability and capacity to meet service level objectives
7. Continuous innovation and service improvements

Operational Performance

6. Capability and capacity to meet service level objectives

Client Satisfaction is defined as the extent to which government service clients are satisfied with the services that they receive.

“Creating WOW moments”

Key Drivers include:
1. Social/cultural factors
2. Macro-performance
3. Micro-performance
4. Political
5. Administrative:
   - Service satisfaction
   - Service benefit
   - Service adequacy

Confidence and Trust in City of Ottawa

Confidence and Trust in the City of Ottawa is defined as the extent to which citizens of Ottawa have confidence and trust in their government.

This is distinct from Client Satisfaction, in that the fourth variable:
• concerns all citizens (not just those who access specific government services); and
• applies to the municipal government as a whole (including elected officials and governance processes) and not just to public servants who provide specific services.

Leadership Challenges
Strategy Highlights

Strategies for Implementation: Corporate and Departmental Service Excellence Plans

A flexible, implementation approach was proposed for Service Excellence. It included:

- Gathering quantitative and qualitative data to gain an understanding of current performance levels on each component of the framework.
- Involving managers and employees in the analysis of data, and in the creation and implementation of improvement plans.
- Distinguishing between corporate-wide improvement efforts and departmental improvement efforts.
- Designing improvement projects using an iterative, incremental approach so that numerous efforts can be underway simultaneously.
- Providing a coordinating mechanism (through ODP) that brings data from all initiatives together.

Strategies for Understanding SE

- Establish an organizational structure
- SMC and EC Meetings and Retreats
- All Managers Forum
- Readiness Assessment
- Employee Survey
- Client Satisfaction Survey
- SE Roadmap
- SE Plans

Responsibilities: Executive Management and Senior Management Committees in Service Excellence

Role of Executive Management Committee (City Manager, Deputy City Managers)
- Approve the framework
- Provide leadership for the service improvement initiatives and the service excellence framework
- Champion the service excellence initiatives with Council and the community and internally with staff
- Approve the final corporate service improvement priorities
- Approve the Corporate Service Excellence Plan
- Monitor the measurement results

Role of Senior Management Committee (General Managers, Directors)
- Develop the Service Excellence Approach
- Set the Service Excellence timeline
- Develop Service Excellence Plans
- Corporate and Departmental
- Lead service improvement initiatives
- Champion the corporate and departmental improvement initiatives with Councilors, Committees Chairs, clients, and stakeholders
- Ensure managers and staff are engaged
- Monitor project results
Responsibilities: Organizational Development and Performance (ODP) and SE Leads in Service Excellence

Role of ODP (Lead Department):
- Provide stewardship for the Service Excellence Framework
- Communicate the framework and its importance and use to managers and employees
- Develop a common approach and timeline
- Develop a toolkit to support the step-by-step process of implementing SE
- Provide support to analyze data and design interventions
- Support implementation projects
- Measure and report results

Role of SE Leads:
- Help create a customer service culture within your area
- Receive and review the findings for your area from the client and employee surveys
- Focus on the drivers that create an engaged and satisfied workforce and a satisfied client
- Create opportunities to involve staff in decision making
- Assist where possible to implement elements of the SE Plan
- Provide the voice and pulse of your branch, department and/or service area
- Communicate and share your experiences, results and recommendations with staff and leaders
- Attend/lead/co-lead your departmental Service Excellence Team.

Responsibilities: Departmental SE Teams

Role of Departmental Service Excellence Teams:
- The Service Excellence teams will take a lead role to assist in the transition to a sustainable culture of Service Excellence
- The Service Excellence team will develop and implement employee engagement activities and priority operational performance improvements
- Develop and implement client service strategies
- Facilitate two-way communication between management and staff to identify, discuss and facilitate resolution in areas identified for improvement by the results of the staff survey
- Conduct research on tools, techniques and information of promising practices that support Service Excellence, employee engagement and operational performance.

Service Excellence Roadmap

- Improvement activities for the components of the service excellence framework (employee engagement, operational performance, client satisfaction) were documented in Departmental Service Excellence Plans

Departmental Service Excellence Plans included:
- Core service outcomes (including how to measure success in achieving those outcomes) and the targets for those measures
- Service offerings to achieve outcomes
- Service standards
- Other key departmental initiatives that support Standing Committee Priorities or are required to implement the new departmental business models
- Key Risks

Readiness for Change: Organizational Assessment

- Purpose
  - What business are we in?
  - Understanding of Vision, Mission, Goals

- Relationship
  - How do we engage employees, clients between groups, manage conflict?

- Structure
  - Leadership
    - How do we keep the boxes in balance?

- Work Tools
  - Do we have adequate coordinating technologies, processes and supports?

- Rewards
  - If there’s research for all that needs doing?
Service Excellence Improvement Process

**Corporate surveys**
- Employees Engagement
- Client Satisfaction

- Implement and Monitor of improvements
- Measure the drivers for Employees Engagement and Client Satisfaction using a survey method
- Plan actions for improvements
- Analyze and report on results

Objectives of the Client Satisfaction Survey

With this first ever client service satisfaction survey we wanted to:

- Identify gaps in service and satisfaction as a result of a service experience
- Provide this information as feedback to staff and management to guide service improvement plans
- Examine how satisfied residents are with their service experience(s)
- Examine what is important to residents
- Establish a benchmark for future surveys
Overall, Ottawa residents are very satisfied with the services provided by the City of Ottawa. Over 60% of respondents rated the City 7 or higher on the 9 point scale.

Mean Score
7.12

Overall Satisfaction Scores

Activities by Audience 2010

GMs
Directors
Managers
Program
Managers
SE Team
Leaders
Shared
Services
BPs/RMs
Supervisors
Team
Leaders
Employees

Learning and Development

Learning & Development Approach

1. Targeted training and the development of audience specific tools
2. Collaboration with other initiatives, e.g. Community Sustainability and Communications to leverage time, resources and costs.

- Create Awareness
  - The shift from awareness and understanding to tools and training requires involving the audience groups to determine the current learning and developmental requirements of each group. Three Reference Groups (Manager, Supervisor and Employee), comprising of representatives from each department, will be established and will be utilized again in 2011. Assessment of the groups, survey or interviews will be conducted for the other audiences. As illustrated in the evaluation matrix, this is an effective way to test and validate timely delivery and approach of relevant content.

- Incorporate Best Practices
  - In 2010, Canadian Management Centre (CMC) designed a Service Excellence Conceptual Development Model for the City based on Best Practices from leading service excellence organizations. The model identified the gaps in knowledge, skills and tools required to support a culture of Service Excellence for GMs, Directors, Managers, Supervisors and Employees. This document is referenced throughout the design of this strategy.

- Apply Lessons Learned
  - Feedback received from symposiums, survey results and through the Learning Centre assessments is utilized to design and develop effective learning and development activities.

- Establish Communities of Practice (CoP)
  - Creates virtual and social circles where people with like interests and requirements can meet e.g. Web portals, social networking, learning events.
Activities Evaluation Summary

<table>
<thead>
<tr>
<th>Activity</th>
<th>Achieved Objective</th>
<th>Exceeded Objective</th>
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<tbody>
<tr>
<td>Disney</td>
<td>96%</td>
<td></td>
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<tr>
<td>Overall Managers Training Symposium</td>
<td>25%</td>
<td>74%</td>
</tr>
<tr>
<td>Overall Supervisors Training Symposium</td>
<td>28%</td>
<td>72%</td>
</tr>
<tr>
<td>Overall Employee Engagement Workshop</td>
<td>22%</td>
<td>78%</td>
</tr>
<tr>
<td>Overall Combined SE Team Leads Program</td>
<td>23%</td>
<td>77%</td>
</tr>
<tr>
<td>Supervisor Symposium Stay Informed Cards</td>
<td>Email 93%</td>
<td>Ozone 47%</td>
</tr>
</tbody>
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Legend:
- New for 2011
- From 2010

Focus: Tools/Training

Activities by Audience 2011

- GMs
- Directors
- Design Thinker
- Training Management
- Forum
- Departmental Spotlight
- Senior Leader Bulletin
- SE Brochure for Council
- Managers Program Managers
- Employee Engagement Video Training Course
- SE Curriculum
- Managers Portal
- Management Forum
- SE Team Leads Program
- Employee Engagement Video Phase I Program
- Phase II Program
- Team Leads Portal
- Harvard ManageMentor
- Supervisors
- Employees
- Training Course
- Shared Services BPs/RMs
- SE DVD
- Kudos in Brief
- In the Loop (Thursday)
- SE Curriculum
- SE Website
- Re-launch
- Facilitators Network

Theoretical Frameworks

- Henry Mintzberg: Advanced Leadership Program, Managing and Coaching Ourselves
- David Cooperider: Appreciative Inquiry
- Gervase Bushe and Robert Marshak: Classical and Post Modern OD
- Marvin Weisbord: 6 Box Theory
- Plan-Study-Do-Act
- Experiencepoint: Experience Change and Design Thinking
- Sharon Turnbull: Players of Culture
- Edgar Schein: Culture
- Beverley Patwell and Edith Whitfield Seashore: Triple Impact Coaching: Use of Self in The Coaching Process

Service Excellence Leads Program
**Purpose**

- The Service Excellence Lead Program was designed to support SE Leads and build on their experience and work managing and providing service excellence.

- SE Leads had an opportunity to:
  - work with other SE leads to build a learning community
  - Deepen their understanding of SE and what is needed to foster a culture of SE in their service area and across the City
  - develop competencies and a learning plan to lead, manage and provide SE
  - obtain supports, tools, techniques and processes to help them in their work.

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**Guiding Principles**

1. Service Excellence is a way of working. It is the how we do our work. The Corporate SE Plan explains what we do.
2. The SE Leads Program will not be an add on to our work. We will use our work, not make work in our approach.
3. We will ensure the program is aligned with the SE strategy and supports legislation, corporate direction, branch plans and staff roles.
4. We are starting from a position of success and will build on this to further foster a culture of service excellence.
5. We will review our services by walking in the shoes of our client’s experience.
6. We will ensure flexibility of application in all SE tools, processes and approaches.

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**Service Excellence**

Service Excellence is about creating a positive client experience each and every time we provide service. Service Excellence is first and foremost an attitude that reflects how people delivering a service feel about their work and how clients feel about the service they receive.

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**Service Excellence Leads Program**

**March-April**

- Finalize Program Design and Content
- Establish SE Teams and Leads

**April**

- Workshop #1: Kick-Off Meeting
- SE Project Workshops
- SE Field Study
- SE Project Workshops

**May-June**

- Workshop #2: SE Project Workshops
- SE Field Study
- SE Project Workshops
- SE Project Workshops

**July-Sept**

- Workshop #3 & 4: Understanding Our SE Culture
- Friendly Consulting + Project Updates
- Dialogue with SMC and other key resources
- Report and Recommendations for next steps

**Oct-Dec**

- Workshop #5: SE Special Topic Workshop (Design Thinking and Community Sustainability)
- Dialogue with SMC and other key resources
- Report and Recommendations for next steps

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**Learning Clusters and Coaching**

- Coaching Sessions
- SE Excellence Toolkit
- HR/ODP Mentors to provide "coach the coach" sessions on SE Plan
- Mentor or Joint SE Lead Technical Training: Performance Measurements, Planning Tools, Survey Roll Out, etc.
Key Program Elements

- Friendly Consulting
- Service Excellence Work
- SE Leads Network
- CoachingOurselves Learning Clusters
- Personal Learning Plans
- Coaching

Corporate SE Accomplishments

- Reviewed all city services and re-aligned them to better meet the needs of the citizens they serve and improve the overall customer experience.
- Conducted an external client survey with the goal of moving away from traditional measures of perceptual service satisfaction and creating an actual experiential measure of the services.
- Conducted an Employee survey to better understand what staff required in order to be engaged and to feel empowered to delivery excellent customer service.
- The results of both surveys now form the baseline of our customer satisfaction and employee engagement results as well as provided direction on initiatives for departmental service excellence plans.
- Conducted research on various client groups (Equity and Inclusion lens, Seniors) allowing departments to plan service delivery options to meet the needs of specific client groups.
- Implemented an online employee engagement tool which allowed staff to provide and comment on ideas regarding what staff required in order to provide better services.
Corporate SE Accomplishments

- Developed and implemented a Service Excellence Learning and Development strategy that included training on the concepts of Service Excellence delivery at all levels of the corporation from the Executive through to the staff level.
- Established a Service Excellence Team with representatives from each department allowing the Service Excellence ideology to be socialized in each department.
- Developed a Service Excellence Marketing strategy.
- Developed and implemented a Shared Services model. This included the implementation of a working relationship model between shared services departments and their clients (other departments).
- Conducted research and implemented a number of web enhancements with respect to the infrastructure in preparation for online services identified for both efficiency and enhanced services initiatives.
- Conducted a Quality Assurance Program review for the Client Services Branch.
- Initiated the development of a Corporate Planning Framework and associated tools which will allow staff to track and manage progress through balanced scorecards and adjust service delivery as required.
- Conducted a service review and identified areas for service improvements – 3 enterprise and 6 departmental projects were identified for implementation.

Departmental SE Accomplishments

- Department planning focused on achievement of results in Client Satisfaction, Employee Engagement and Operational Performance.
- Shift in how plans are developed - greater emphasis on employees ideas and engagement in planning.
- Greater emphasis on the need to communicate to staff (newsletters, forums, websites, social media).
- Expanded focus on automation, process improvement, innovation for clients benefit.
- Emphasis on changes that address the unique needs of client groups (language, equity, accessibility).

Departmental SE Accomplishments

- Each department has developed their own individual service excellence plans based on the same public sector value chain concept. Departments have identified a total of 200 plus improvement activities accomplished to date. Some of the departmental accomplishments to date are listed below:
- Implemented an accounts payable automation pilot project.
- Implemented Call recording on Revenue Contact Queue for quality assurance.
- Developed Equity & Inclusion Staff Network to support departments in designing services to meet the needs of diverse client groups.
- Developed an Accessibility plan within Transit Services for implementation.
- Developed an Older Adult (Seniors) Plan which will inform service delivery to this client group for all departments.
- Develop project intake process to provide clarity for Infrastructure Services clients.
- Engage internal stakeholders and industry clients to improve a new business process to issue mail-out permits (infrastructure services) hired Public Information Officer for Ottawa Fire Service to promote services in the community.
- Began to implement the concept of Mobile Office in Emergency and Protective Services to support the concept of maximizing the efficiency of staff.

Departmental SE Accomplishments

- Hired Public Information Officer for Ottawa Fire Service to promote services in the community.
- Began to implement the concept of Mobile Office in Emergency and Protective Services to support the concept of maximizing the efficiency of staff.
- Successfully negotiated and acquired property within Real Estate Partnership and Development Office to enable economic stimulus projects.
- Human Resources automated Employee Transactions (RPAs) phase 1 simplifying the process for managers and making them more efficient.
- Negotiate new Standing Offer for Legal Services to optimize the use of a competitive process.
- Review POA & Parking ticket revenue Collection & Reporting to ensure efficiency and ease of payment for clients.
- Implement Accessible Voting Locations.
- Develop a Social Media Use Policy which will allow for future development of improved service offerings to the public.
- Implemented a streamlined roadway modification process integrated with the development review process within Planning and Growth Management.
Service Ottawa Initiatives

- The Service Ottawa Program is a Citizen Focused, Service Delivery Driven initiative that will fundamentally transform how citizens receive services from the City. It will deliver consistent, accessible, high-quality information and services to citizens, while implementing new processes and leveraging technology to streamline how the City does business.

- The Program oversees the development and implementation of nine transformational initiatives:

  **Enterprise**
  - Citizen Centric Services
  - Mobile Workforce Solutions
  - Business Systems Integration

  **Department**
  - Transform Fleet Management (Public Works)
  - Innovative Management, Operating and Business Practices (Public Works)
  - Smart Energy (Public Works)
  - Sponsorship and Advertising (Organizational Development and Performance)
  - Optimize Utilization of Recreation Facilities (Parks, Recreation & Culture)
  - Integrate Community and Social Services (Community and Social Services)

Reflections

- Framework really resonated and assisted staff in understanding the SE vision
- Putting employee engagement front and centre of the vision has really connected improvements to customer and client service
- Target groups developed their own training and engagement activities (at the departmental level)
- Spent one year focusing on senior management and management learning concepts before organizational and system implementation

Other Benefits

- Elected officials and Senior Management are aware of all issues occurring in individual wards and City-wide
- Centralized knowledge management and automated workflow process = high quality and consistent responses from front-line agents
- Citizens can choose how they interact with City knowing they receive same information
- All requests tracked through to conclusion
- Multi-language capabilities
- Improved response times and information dissemination
- Leveraging emerging trends in technology to allow for social networking services as vehicle for communicating with City – Call volumes diminish as web/mobile solutions expand

Lessons
Lessons…continued

- Survey results were published and held people accountable and increased staff buy-in to the vision. Staff understood that there was a commitment to improve survey results (a culture shift)
- SE Leads program created grassroots collaborative culture, and focused on staff development as a key benefit to participation
- Increased participation

Key Strategic Decisions

1. Leadership Focus
2. Project Management
3. Service Excellence Leads Network
4. Use Work, Don’t Make Work
5. Continuous Evaluation
6. Use of Internal and External Consultants

Next Steps

- Creating the organizational structure and governance structure for new Service Ottawa
- Continue with SE Leads Program
- Strengthen Community, teamwork and partnerships
- Continue building a learning organization

Panel Discussion
Panel Discussion

1. What can you do to foster a culture of service excellence in your organization?
2. What questions do you want to explore with our panel?

Celebrating Success in Public Works

Resources
## Resources

Available on the Conference Website:

1. A Case Study of Fostering A Culture of Service Excellence in The City of Ottawa (pdf including bibliography and this powerpoint presentation are available on the conference website and at [www.patwellconsulting.com](http://www.patwellconsulting.com))
2. Service Excellence Field Study Exercise
3. Service Excellence Project
4. SE Leads Program Evaluation Survey Sample