

Appendix Y: Administrative Directive #AD-25

HILLSBOROUGH COUNTY
Office of the County Administrator

ADMINISTRATIVE DIRECTIVE #AD-25

SUBJECT: Point of Service Customer Surveys

EFFECTIVE DATE: March 24, 2008

REVIEW DATE: March 24, 2010

SUPERCEDES: January 8, 2007

Authority

On February 2, 2005, the Board of County Commissioners adopted a Strategic Plan for the County, consisting of eight Strategic Goals, and measurable objectives for each of those goals. Goal #3 in the plan is to work with citizens and neighborhoods in order to ensure quality services are delivered. One of the objectives listed under this goal is to attain a customer satisfaction rating of 90% on the County's delivery of services in a courteous and responsive manner, as measured through point-of-service feedback, by FY 06.

Purpose

The purpose of this Administrative Directive is to establish uniform procedures for creating, disseminating, summarizing, reporting, and using point of service customer surveys for departments under the County Administrator.

Survey results will be used to 1) Improve services by listening to customers and responding; 2) Include departmental customer satisfaction goals in performance evaluations; and 3) Measure progress in achieving the BOCC's Strategic Plan objective on customer satisfaction.

Responsibility

All Departments under the County Administrator are required to comply with the following guidelines and procedures.

Directive

Point of Service Surveys: Surveys should provide a valid sampling of feedback in order to avoid bias. Surveys provided with this directive will replace any current feedback tools used by departments to measure customer satisfaction. However, it does not replace other surveys used by departments to determine customer needs, expectations, or program priorities. For most operations, Departments should solicit point of service customer feedback from each significant customer

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service encounter. Customers should be given the option of completing the survey at the time service is delivered (by means of card or email survey), or taking the card home and mailing it back to the department by means of the postage-paid, pre-paid address on the reverse of the card. Departments may also distribute surveys via U.S. mail, in the form of business reply cards or provide a cost-free opportunity to include the survey with their monthly bill when service has been requested (service turned on or off, meter investigation, etc.).

However, departments serving a large volume of customers (e.g. Solid Waste, Water Resources, Health and Social Services, Library Services, Aging Services, etc.), may elect to distribute surveys at random intervals throughout the year, or to every 10th customer in order to create a systematic sampling method designed to achieve a representative and valid response. Keep in mind that both random surveying and systematic sampling have a potential for bias. The bias occurs when the individuals being rated by the survey are suppliers of the service to the customer. When the employee knows to whom the survey is going there is a possibility that the individual's behavior is affected. Therefore, departments may want to consider selecting a single staff person (i.e. receptionist) to provide and collect the surveys. Customers should not be asked to complete a survey in the direct presence of the employee that served them.

Creative Research Systems at, <http://www.surveysystem.com/sscalc.htm>, provides a sample-size calculator to determine how many people you need to interview in order to get results that reflect the target population and confidence level as precisely as needed. To ensure a valid number of responses from the target population, a response rate goal of 30% has been set. In order for Departments to track their response rate, each individual department needs to keep a tally of the surveys sent to customers along with how many are returned. Pre-numbering the survey cards may assist in maintaining those tallies. If it appears that a 30% response rate cannot be achieved with the sample size calculated by the above mentioned website, more surveys can be distributed in the manner outlined in the Point of Service Surveys section of this directive.

Active efforts should be made to encourage customers to complete the surveys. For departments with external customers and poor response rates, incentives may be offered using promotional or marketing items approved for County use under AD-22. Signage soliciting customer feedback should be placed at strategically located points. A sign designed by Communications for that purpose is available on COIN.

Surveying Internal Customers: This directive applies to internal as well as external customers. Departments that serve internal customers should perform two types of surveying: 1) point of service surveys of the employees served in other departments; and 2) at least annual surveys of the department directors of the departments served. For the point-of-service surveys, the same survey questions should be used as for external (public) customers. Internal surveys may be presented at point of contact, via email or inter-office mail. For the department director surveys, the surveys should focus on satisfaction with the value of the services received, and the estimated cost of those services should be identified.

Ensuring the Validity of Customer Feedback: The validity of the feedback that has been received will be tested periodically through sample audits conducted by the Internal Performance Auditor. "Mystery shoppers" may also assist in monitoring actual service encounters, using staff of the Internal Performance Auditor or volunteers recruited by the County. Departments may also arrange

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to have other departments receive or take custody of their returned customer survey cards.

Contractual Services: All new contracts for direct public services shall include customer satisfaction surveys as part of the contractor's requirements.

Printing Surveys: Each department shall be responsible for printing survey cards for their use. The survey shall indicate the department's name (instead of County Administrator's office, as shown on the sample) and shall have the department's return address printed on the reverse side of the survey card or provide a cost-free opportunity to include the survey with their monthly bill.

If the department is asking another department to take custody of their feedback, the address of the receiving department should be used. The statement "No postage necessary – postage has been prepaid by" should be stated above the return address. In addition, the four-digit mail code should appear in the upper, left-hand corner. Please see the [example](#) provided.

Surveys shall be the size of a postcard, using the set of questions on the [survey card](#) provided. Departments may add 2-3 questions to fit their needs. The length of the questions should be kept to a minimum, and should be formulated to yield exactly the information that is sought. Any added questions should be after the overall satisfaction question on the standard form, to preserve a core set of customer responses that can be compared between departments. Keep in mind that the survey cards should be no larger than 4-1/4" x 6" to keep the post card postage rate. Anything larger would require first class postage.

The survey is designed for person-to-person encounters. For feedback from services in the field that do not require person-to-person contact (e.g. road work, street sweeping, solid waste pickup), questions will need to be altered to gain satisfaction with the quality of the work or service provided, and the response choices (i.e. 1 being poor, and 5 being excellent) should be maintained. These alternative survey questions should be submitted to the Manager of Administrative Services for review and approval by an interdepartmental/customer service committee. Surveys may be distributed via a mail-out, by distributing door hangers that contain a postage paid, pre-addressed survey card that may be returned to the department, or call-backs.

Coding: Each survey form should contain an inconspicuous unique identifier or survey code number. This coding can permit departments to isolate responses by service location, type of service, provider, or other distinction that would be meaningful in monitoring and improving service delivery.

Departments can provide any number of survey cards to Mail Services, and the postage will be affixed to the cards and returned to the department. The name of the department's point of contact and four-digit postal code shall be provided to Mail Services at the time of the request. There is a one-day turnaround for this process.

Departments with a larger customer base may consider setting up a Business Reply Mail account. Mail Services staff will provide detailed information regarding format and cost, as well as assistance

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with setting up the accounts.

Electronic surveying: For those departments using Web Surveyor, or other electronic survey instrument, the link to the survey shall be provided to the customer. If providing assistance via email, the link to the survey is to be included in the employee's email signature for the customer's convenience.

Solicited and Unsolicited Feedback: Departments or the Citizens Action Center may also receive unsolicited complaints regarding County services. All complaints should be reviewed and responded to by departments and feedback solicited on how well the response was handled. Departments should log in, track, respond and solicit customers' feedback. This data should be separated from the solicited feedback described in this directive to avoid biasing that data. While not included in the tabulated data, summaries of this unsolicited feedback should be provided in a comments section associated with the quarterly reports described below. The department's log should include a number, amount of time it took to resolve the issue, and level of customer satisfaction.

Using and Reporting Survey Results and Communicating Improvements in Services: Department Managers should review all solicited and unsolicited feedback, follow-up with all customers who were dissatisfied with the service they received, and use this information to correct any service failures or problems. Point of Service customer surveys should be tallied, evaluated and acted upon on a regular basis and reported to the Assistant County Administrator for the department and to the Deputy County Administrator. Those summary reports should be prepared on a quarterly basis (for the quarters ending in March, June, September and December), and the information should also be posted on the County/department's website and distributed to employees and any customers that have asked for a copy of the survey results and/or information about specific improvements to service that have been initiated as a result of the information obtained from the surveys. The quarterly reports should include a description of the methods used to solicit customer feedback during the quarter. If sampling techniques were used, a description of the sampling procedure used to achieve a representative and valid response should be provided. An interdepartmental committee will review the quarterly reports, consult with departments on any implementation issues, and advise on any changes needed in this Administrative Directive.

Department Recognition: After the close of the Fiscal Year, departments will be recognized with a Certificate of Achievement, signed by the County Administrator and the Chairman, BOCC, for Customer Satisfaction survey results, based on the following criteria:

1. "Most Improved – For the department achieving the highest percentage of Customer Satisfaction improvement over the previous fiscal year. The rating used will be the customer satisfaction percentage for the entire year compared to the satisfaction level in the previous Fiscal Year.
2. "Highest Customer Satisfaction" – For the department achieving the highest percentage of Customer Satisfaction for the Fiscal Year.
3. "Honorable Mention" – For the departments achieving an annual average of 90% or higher.

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In order to be eligible to receive one of the above awards, the survey methodology must be submitted and approved by the interdepartmental committee and the number of surveys received must be deemed statistically valid and/or representative of the customers served, based on the type of services provided and survey methodology.

Oversight Responsibility: All departments under the County Administrator

Approved by: /S/ _____ 3/24/08
County Administrator Date