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Presentation Agenda

- Improving City Business Processes
- What is ZOOM?
- Vital Statistics Project Results
- Parks Reservation Project Results
- Lessons Learned





Improving City Business Processes

- Human Resources Innovation & Reform Group
 - Assists City management and departments to improve business processes and outcomes
- Parks & Recreation and Metro Health Departments
 - Approached the Innovation & Reform group with identified business processes to be improved
- ZOOM
 - Chosen by the groups as the methodology to analyze existing business processes to enhance their efficiency, effectiveness and customer service results



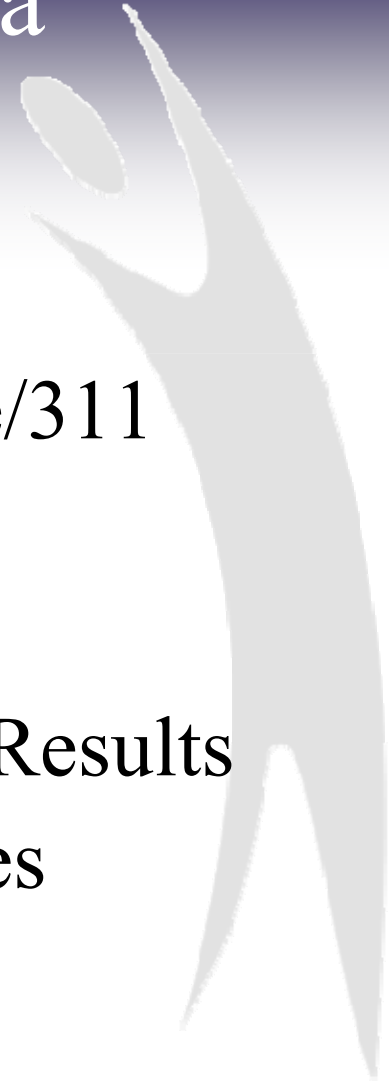
What is ZOOM?

- **Creating-Introducing-Supporting Process Improvements**
 - Leadership coaching, mentoring, training and facilitation
 - Accelerated process improvement training
 - **Establish Roles and Responsibilities**
 - Sponsors, Team Members (frontline employees), Facilitators
 - **Design a Sponsorship Agreement**
 - To establish mutually understood expectations and accountability
 - **Identify Needs and Implement Change**
 - Map the business processes
 - Identify causes for time delays/errors
 - Brainstorm and test possible solutions
 - Recommend changes to Sponsors→Implement approved changes



Vital Statistics Agenda

- Our Team
- The Vital Statistics Office
- The Office of Customer Service/311
- Objective Statements
- Baseline Data
- Tested/Approved Changes and Results
- Other Potential/Pending Changes
- Future Considerations





Our Team

- Charles Pruski – Sponsor (Health)
- Linda Wasserman – Sponsor (Health)
- Sam Torres – Team Leader (Health)
- Josie Leal – Team Member (Health)
- Susana Perez – Team Member (Health)
- Linda Jensen – Team Member (311)
- Scott Long – Team Member (Health)
- Jennifer Ramirez – Facilitator (HR)
- Marc Castro – Facilitator (HR)
- Jesse Paul Hernandez – Ad Hoc Member (Health)
- James Cates – Ad Hoc Member (ITSD)



The Vital Statistics Office

- Registers, Maintains and Sells Records of Births and Deaths that Occur in Bexar County; Sells Immunization Records
 - FY 2007
 - 11 staff positions
 - 39,033 birth certificates sold
 - \$1.8 million in General Fund revenue (including Links)
 - 96,274 death certificates sold
 - \$537 thousand in General Fund revenue (including Links)
 - 1,724 immunization records sold



The Office of Customer Service/311

- Makes City Services Convenient and Accessible
 - Conveniently located Customer Service Centers (Link Centers)
 - Sells Birth/Death Certificates and Immunization Records
 - FY 2007
 - 51,061 birth certificates sold
 - 292 death certificates sold
 - 7,475 immunization records sold



Objective Statements

- Decrease Processing Time for Birth Certificates and Improve Customer Service
 - Performance Measures
 - Time per registered certificate
 - Time per sales transaction
 - Time per End-of-Day closeout





Baseline Data

- Birth Certificate Registration Time
 - In Process: 40.1 minutes/registration
 - Hands On: 32 minutes/registration
- Birth Certificate Sales Time
 - In Process: 5.8 minutes/sale
 - Hands On: 5.4 minutes/sale
- End of Day Closing
 - In Process: 22 hours, 38 minutes/cash register
 - Hands On: 5.6 minutes/cash register





Tested/Approved Changes and Results

- Business Process Streamlining
 - Streamlined Quality Control Process (ref #1)
 - Creation of an error report to identify needed corrections
 - Also impacts death certification process
 - No cost
 - Est. 61 hours/yr staff time saved (equivalent to \$960/yr)
 - Eliminated Need to get a Supervisor's Signature on Hand Written Receipts when the Receipt Printer Breaks Down (ref #2)
 - No cost
 - Est. 2 hours/yr staff time saved (equivalent to \$35/yr)
 - Est. 2 hours/yr customer time saved



Tested/Approved Changes and Results

- Business Process Streamlining (Cont.)
 - Eliminated Need to Re-count End-of-Day Cash Drops (ref #3)
 - Increased the change fund by \$500; completing deposit slip count at the end of each business day
 - No cost
 - Est. 48 hours/yr staff time saved (equivalent to \$914/yr)
 - Eliminate Advertised Sale of Wallet-size Birth Certificates
 - Precedent set by State of Texas
 - Limited usefulness for most intended purposes
 - Significant drop in sales over the last two years
 - Metro Health to revisit revenue projections during Financial Forecast period



Tested/Approved Changes and Results

- Improving Customer Service
 - Enhance Lobby Customer Service (ref #4)
 - To assist customers in lobby during peak periods
 - Reduces wait and processing time
 - No cost
 - Est. 1,013 hours/yr staff time saved (equivalent to \$17,064/yr)
 - Est. 1,013 hours/yr customer time saved
 - Redesigned Application Form (ref #5)
 - Consolidated and reformatted English/Spanish application form
 - **No cost: actual savings in printing budget estimated at \$3,677/yr**
 - Est. 603 hours/yr customer time saved



Tested/Approved Changes and Results

- Improving Customer Service (Cont.)
 - Expanding Available Customer and Staff Information (ref #6)
 - Edited Web Site Design and Information
 - To Enhance signage
 - To Update informational documents
 - New Signage cost TBD
 - Est. 157 hours/yr staff time saved (equivalent to \$3,060/yr)
 - Est. 157 hours/yr customer time saved



Tested/Approved Changes and Results

- Technology-Related
 - Reduced Mainframe Data Upload Steps (ref #7)
 - Eliminated automated processes that caused errors/delays
 - Also impacts death certification process
 - No cost
 - Est. 122 hours/yr staff time saved (equivalent to \$1,920/yr)
 - Automated TER to Mainframe Upload Notification Process (ref #8)
 - Eliminated need to request upload via e-mail
 - Also impacts death certification process
 - No cost
 - Est. 4 hours/yr staff time saved (equivalent to \$70/yr)



Tested/Approved Changes and Results

- Technology-Related (Cont.)
 - Create a Digital Imaging System (ref #9)
 - To eliminate time-intensive look-up and photocopying tasks
 - Also impacts death certification process
 - Cost TBD
 - Est. 3,984 hours/yr staff time saved (equivalent to \$69,195/yr)
 - Est. 3,984 hours/yr customer time saved
 - Implement a Call Management System (ref #10)
 - To enhance phone customer service by better allocating incoming phone calls
 - Call tracking in January with est. implementation in February
 - Est. cost roughly \$1,000 for software licenses
 - Est. 146 hours/yr customer time saved



Tested/Approved Changes and Results

- Technology-Related (Cont.)
 - Replace Legacy Point of Sale System (ref #11)
 - Part of a larger, enterprise-wide effort to streamline point-of-sale processes and auditing capabilities
 - Cost TBD
 - Est. 52 hours/yr staff time saved (equivalent to \$995/yr)
 - Purchase High-speed Impact Printers (ref #12)
 - State of Texas requires use of impact printers to sell State certificates
 - Existing dot-matrix style printers outdated
 - Est. cost roughly \$2,200 (\$1,400 one-time and \$800 recurring)
 - Est. 37 hours/yr staff time saved (equivalent to \$643/yr)
 - Est. 37 hours/yr customer time saved



Tested/Approved Changes and Results

- Technology-Related (Cont.)
 - Streamlined End-of-Day Closeout Calculations (ref #13)
 - Created user-friendly MS Excel end-of-day closeout spreadsheet
 - No cost
 - Est. 38 hours/yr staff time saved (equivalent to \$775/yr)



Overall Impact

Est. Total Time Saved: 11,460 hours/year

Est. Value of Total Staff Time Saved: \$95,631/year

– **Staff**

- Time Saved: 5,518 hours/year
- Value of Time Saved: \$95,631/year

– **Customers**

- Time Saved: 5,942 hours/year

Actual Costs: \$3,200 (\$1,400 in one-time costs)

Actual Budget Savings: \$3,677 (recurring)



Other Completed/Pending Changes

- Decreased Turnaround Time for Customer Receipt of Death Certificates Purchased at Link Centers (completed)
- Fixed Funeral-home Phone Line (completed)
- Updated Existing Office Voice Line (completed)
- Office Furniture Rearranged (completed)
- Implement Mid-day Cash Drops to Save on End-of-Day Closing Time and Improve Cash Reconciliation (in progress)
- Enhance Informational Displays (pending)
- Adjust Staff Assignments (pending)
 - To allow time to process mailed-in applications uninterrupted by phone duties
 - Subsequent to implementation of CMS and other changes
- Establish Written Protocols (pending)



Future Considerations

- Begin Analysis of Death Certification Process
- Follow-up on Changes to Texas Electronic Registrar (TER) System
 - Automation of the Local File #, Date and Signature
- Submit a 3-month and 6-month Status Report to Metro Health Project Sponsors
- Evaluate Site Relocation Options
 - Office of the City Clerk to expand its records facility in FY 2010
- Prioritize SAPD Security Assessment Recommendations
 - Based on cost estimates and potential move-out scenario



Thank You

- Gratitude and appreciation to the following for their participation and effort:

Name	Organization	Role
Linda Jensen	Customer Service/311	Team Member
Tony Lopez	Customer Service/311	Resource
Cappi Arriola	Finance	Resource
Alejandro Tijerina	Finance	Resource
Gary Johnson	Finance	Resource
Mike Martinez	Finance	Resource
Jesse P. Hernandez	Health	Team Member (ad hoc)
Josie Leal	Health	Team Member
Susan Perez	Health	Team Member
Scott Long	Health	Team Member
Sam Torres	Health	Team Leader
Charles Pruski	Health	Sponsor
Linda Wasserman	Health	Sponsor
Doug Eckhardt	Health	Resource
Virginia Cobarrubias	Health	Resource
Margie Rayos	Health	Resource
Nora Alvarado	Health	Resource
Diana Cabrera	Health	Resource
Ana Arauza	Health	Resource
Araceli Hernandez	Health	Resource
Lorena Vielma	Health	Resource
Rosalinda McCumba	Health	Resource
Richard Condra	Health	Resource

Name	Organization	Role
Edward Belmares	Human Resources	Resource
Nikki M Ramos	Human Resources	Resource
Charlotte Barrett	Human Resources	Resource
Jennifer Ramirez	Human Resources	Facilitator
Marc Castro	Human Resources	Facilitator
Hugh Miller	Information Technology Svcs	Resource
Linda Bibles	Information Technology Svcs	Resource
Jim Cates	Information Technology Svcs	Team Member (ad hoc)
Mike Mitchell	Information Technology Svcs	Resource
Berdell Lindsey	Information Technology Svcs	Resource
Mark Farrell	Information Technology Svcs	Resource
Richard Sanchez	Information Technology Svcs	Resource
Julia Aguirre	Office of the City Clerk	Resource
Roland Castaneda	Office of the City Clerk	Resource
Toby Bowan	Office of the City Clerk	Resource
Cynthia Garcia	Office of the City Clerk	Resource
Hector Hernandez	Office of the City Clerk	Resource
Catherine Geissler	OutsideEdge	Consultant
Mike Peters	Police	Resource
Jean Baumann	Present Dynamics, Inc.	Consultant
Frank Salinas	Purchasing & Contract Svcs	Resource
Anthony Segura	Purchasing & Contract Svcs	Resource



Vital Statistics Project Questions and Answers





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Parks Reservation Team Presentation Agenda

- Our Team
- The Reservation System
- Project Objectives
- Baseline Data
- Tested/Approved Changes and Results
- Future Considerations
- Thank You



Our Team

- Malcolm Matthews – Sponsor (Parks & Recreation)
- Tony Bosmans – Sponsor (Customer Service)
- Mike Gonzaba – Sustaining Sponsor (Parks & Recreation)
- Janet Martin – Sustaining Sponsor (Parks & Recreation)
- Laura Davis – Sustaining Sponsor (Customer Service)
- David Rios – Team Leader (Customer Service)
- Cynthia Alvarez – Team Member (Parks & Recreation)
- Bertha Cardona – Team Member (Customer Service)
- Jeffrey Cuellar – Team Member (Parks & Recreation)
- Rose Galvez – Team Member (Downtown Operations)
- Cheryl Kindervater – Team Member (Parks & Recreation)
- William Martinez – Team Member (ITSD)
- Pouy Divin – Facilitator (Human Resources)
- Amanda Norquest – Facilitator (Human Resources)



The Parks Reservation System

- Parks & Recreation oversees 450 reserveable parks/facilities
- Parks & Recreation and Customer Service manage over 9,000 facility reservations per year
- Customer Service and Finance process about 2,400 security deposit returns per year
- Community Link Centers answer over 53,000 customer calls about facility reservations every year, about 1/3 of the Link Centers total call volume.
- Almost 350 City staff are involved in the reservation process each year



Objective Statements

- Decrease time in the Park Facility Reservation Process
- Improve customer service in the Park Facility Reservation Process





Baseline Data

End-to-End Reservation Process

- **Mass Facility: 68 Days**
 - In Process Time (total time from end-to-end): 67.4 Days
 - Hands On Time (does not include wait time): 4.5 Hours
- **Special Events: 31 Days**
 - In Process Time: 30.4 Days
 - Hands On Time: 4.5 Hours
- **Community Center: 44 Days**
 - In Process Time: 43.6 Days
 - Hands On Time: 20 minutes



Tested/Approved Changes and Results

1. Update & improve facility information available to customers and staff.

Update web site	Update facility data in ISPR
Post signage at facilities	Update hard copy info for customers
Auto-notify staff of reservation info	Assign staff to ensure continual updating

- Estimated Results
 - Staff time saved: 1,506 hours per year
 - Value of staff time saved: \$34,070 per year
 - Customer time saved: 22 hours per year
 - Security deposit return time reduced by 3 days on average
- Estimated Cost
 - \$48,588 recurring total compensation for new and re-classified positions
 - \$5,000 one-time cost for purchase of signage



Tested/Approved Changes and Results

2. Replace the current ISPR system with an online reservation/registration system with e-commerce capability.
 - More options and flexibility for customers
 - Improves customer access to information
 - Team has viewed demos and conducted peer city research
 - Estimated Results
 - Staff time saved: 1,295 hours per year
 - Value of staff time saved: \$34,261 per year
 - Estimated Cost
 - \$163,901 one-time software purchase
 - \$27,675 recurring maintenance costs



Tested/Approved Changes and Results

3. Create instruction manual for staff to use in maintaining the facility reservation database.
 - Ability for staff to update facility information efficiently
 - Eliminates dependence on single knowledgeable staff person by allowing for staff cross-training
 - Estimated Results
 - Staff time saved: 563 hours per year
 - Value of staff time saved: \$30,390 per year
 - Estimated Cost: \$0
 - Existing staff are creating instruction manual



Tested/Approved Changes and Results

4. Purchase hands-free telephone headsets for Customer Service Representatives and implement a phone-routing system for facility reservation calls.
 - Decrease hold-time for customers
 - Allows customers to reach correct City staff person without multiple transfers
 - Estimated Results
 - Staff time saved: 1,234 hours per year
 - Value of staff time saved: \$27,027 per year
 - Customer time saved: 1,207 hours per year
 - Estimated Cost
 - One-time \$6,199 for purchase of headsets



Tested/Approved Changes and Results

5. Establish a “one-stop” location at Parks & Recreation headquarters for special events/mass facility and athletic league customers, to include cash handling capabilities.
 - Eliminate need for customers to travel to multiple locations to complete reservation process
 - Estimated Results
 - Customer time saved: 55 hours per year
 - Estimated Cost: \$0
 - Consolidation of staff will occur at new Parks & Recreation headquarters facility



Tested/Approved Changes and Results

6. Standardize certain facility use agreements, permits, and other forms.
 - Eliminate redundancies and duplicate forms
 - Allows for standardized language in facility information disseminated to customers
 - Estimated Results:
 - Staff time saved: 80 hours per year
 - Value of staff time saved: \$1,669 per year
 - Estimated Cost: \$0
 - Parks & Recreation, Downtown Operations, City Attorney's Office, and Human Resources (Risk Management) are forming a committee to begin this process



Overall Impact

Estimated Total Time Saved: 5,962 hours per year

Estimated Value of Total Time Saved: \$127,417 per year

- Staff
 - Time Saved: 4,678 hours per year
 - Value of Time Saved: \$127,417 per year
- Customers
 - Time Saved: 1,284 hours per year

Total Estimated Costs:

- Recurring: \$76,263
- One-Time: \$175,100



Future Considerations

- Collaborate with ITSD to create an interim system through ISPR for athletic league registrations (in progress)
- Downtown Operations Department may wish to add its reserveable facilities into the ISPR reservation system (in progress)
- Design and implement management reports concerning facility usage
- Provide 3-month and 6-month implementation status updates to Sponsors
- Evaluate enforcement of policies and procedures for non-compliant customers



Thank You

- **Brenda Burton**, Parks & Recreation
- **Lyn Kinton**, Parks & Recreation
- **Chief Steven Baum**, Parks & Recreation
- **Sgt. Tim Packard**, Parks & Recreation
- **Mark Jenkins**, Parks & Recreation
- **Berdell Lindsey**, Parks & Recreation
- **Lions Field Community Center Staff**, Parks & Recreation
- **Tony Lopez**, Customer Service / 311 Service Department
- **Hugh Miller**, ITSD
- **Yolanda Maldonado**, ITSD
- **Caesar Bustos**, ITSD
- **Alan Smith**, ITSD
- **Paula Stallcup**, Downtown Operations Department
- **Colleen Swain**, Downtown Operations Department
- **Blanche Mendoza**, Downtown Operations Department
- **Alston Moore**, Finance Department
- **Gloria Ramos**, Finance Department
- **Edward Belmares**, Human Resources Department
- **Nikki Ramos**, Human Resources Department
- **SallyAnn Rigdon**, Human Resources Department
- **Heidi Heridia**, Human Resources Departments
- **Steve Whitworth**, City Attorney
- **Development Services IT Staff**, Development Services Department





Parks Reservation Project Questions and Answers





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Lessons Learned

- ZOOM
- Project Specific





ZOOM Lessons Learned

- Sponsor buy-in was key
- Process highlighted/prioritized already known improvements
- Sponsor-provided budget ensured expedited implementation of some approved requests
- Change requests helpful but have little implementation value: testing concepts as opposed to real implementation plans
- Good planning is helpful
- Some important areas fall outside of the “testing” component of ZOOM
- Teamwork is necessary to fix a system that is not working right; this was a great experience
- Don’t be afraid to ask for help...you may just get your wish
- It is not impossible to make a change. The statement “We’ve always done it this way” is now obsolete!



Project Lessons Learned

- Current and updated information available to customers is important for customer service and efficiency
- A one-stop location is important for great customer service
- A “new” or “updated” reservation system will be imperative for future growth of the park reservation operation
- Understanding of other departments’ and divisions’ roles in the Parks Reservation System
- Clear agenda was helpful
- Sharepoint was useful for posting and accessing notes and record keeping
- Clear meeting times (set well in advance) were helpful
- Subject matter experts should be diversified/rotated: include IT/fiscal staff and other front-line staff
- Project taught us about other employees’ job duties and respect for what they do



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