

TEXAS BOND REVIEW BOARD

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REPORT ON CUSTOMER SERVICE

June 1, 2018

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Report on Customer Service

Section 2114, Texas Government Code, requires state agencies to develop customer service standards and implement customer satisfaction assessment plans. This process is to be completed by June 1st of each even-numbered year. This is the first step in an agency's strategic planning process.

In order to gauge how well the Bond Review Board (BRB) serves its customers, a process similar to the prior customer service survey was used. This included surveying the widest variety of customers as efficiently as possible. To this end, customers from all three of the BRB's program areas were asked to complete the online survey that was automatically emailed to BRB staff for compilation and analysis.

Inventory of External Customers

The BRB's mission statement includes three goals: Goal 1 is the review and approval of most state-issued debt; Goal 2 is the tracking and reporting of Texas local government debt; and Goal 3 is the administration of the state's Private Activity Bond Allocation Program. The agency has a wide variety of customers, from state and local issuers and municipal securities professionals to the general public, all of whom seek debt data and information.

Goal 1 customers include state debt issuers, professionals employed by state debt issuers (i.e., financial advisors, bond counsels et al), state agency staff, rating agencies, legislators and their staff, media, legislative and academic researchers and the general public. Services provided to this customer base include review and approval of most debt issues, preparation of reports on state debt and debt affordability and posting state debt information, compilation of the state's capital expenditure plan and posting guidelines on debt management and interest rate management agreements.

Goal 2 customers include rating agencies, issuers, legislators, policy makers, state agency staff, local government officials, academic researchers and the general public. Services provided to this customer base include information on local government debt issuance, debt outstanding, related debt-ratio statistics and trends and the preparation of a local debt annual report. The available data can be used as a tool for local governments to assess their debt-management practices.

Goal 3 customers include state and local issuers, the public finance community and the professionals they employ (i.e., financial advisors, bond counsels, developers and issuers), certain state agencies and the general public. Services provided to this customer base include the administration and allocation of the Private Activity Bond Allocation Program (PAB) and ministerial functions for certain other federal tax-exempt bond programs.

Information Gathering Methods

The BRB has had an online customer service survey available on the agency's website since December 2003. Customers can access a permanent link to the survey on the home page of the agency's website at www.brb.texas.gov.

On March 27, 2018 emails were sent out to 436 customers of the BRB requesting that they complete the survey online. Responses were received from 43 recipients for a response rate of 9.9%. The last response was received on April 20, 2018.

The survey included queries on service areas, facilities, staff, communications, the agency's website, complaint handling processes, timeliness and printed information. The survey also allows respondents to add general comments as desired. When asked to select a service area, respondents separated the results into five areas – the three agency goals listed above, the Capital Expenditure Plan (CEP) and "Other." Each respondent was then asked to select poor, below average, average, above average, excellent or does not apply. These scores were given the numerical representation of one through five, respectively, and the "does not apply" response received no score.

Email addresses from internal databases and staff address books were used to source Goal 1 customers.

Goal 2 surveys were distributed to members of the state and local government entities that had initiated contact or interacted with the BRB since the prior survey was taken in 2016. They were selected by reviewing contacts that had provided email addresses that were listed in the agency's performance measure database.

In addition to the customers listed for Goals 1 and 2, inquiries about Goal 3 are often received from the legislature and the general public. Because the PAB program administrator uses email for certain required notifications, persons listed in the PAB database were included in the survey.

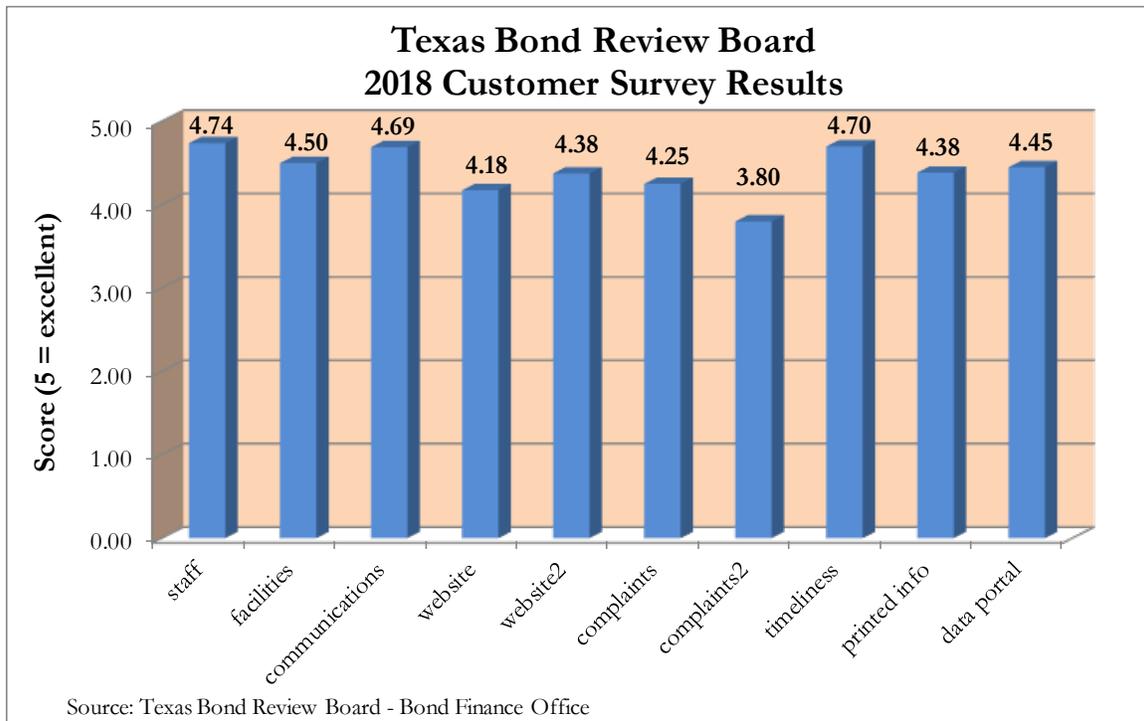
The BRB also administers the state's CEP in conjunction with the Texas Higher Education Coordinating Board. All state agencies and institutions of higher education that have plans to purchase land, buildings or information systems in excess of \$1 million are required to file this report with the BRB. Email contacts derived from the CEP were requested to participate in the survey as well.

Customer Satisfaction Findings

The agency sent emails to 436 recipients requesting completion of the online survey and received 43 responses. Five was the highest rating available in a customer-service quality element, while one was the lowest rating possible, BRB staff chose a rating of three as the minimal acceptable level of customer satisfaction.

The results indicate that the highest scoring customer-service quality elements were the BRB staff, communications and timeliness in providing requested information. The sample size for ease of filing service complaints (shown as "complaints" in the chart) was small with 81.4% of the respondents selecting "does not apply". The sample size for a complaint being resolved in a timely manner (shown as "complaints2" in the chart) was also small with 88.4% of the respondents selecting "does not apply". No complaints were filed with the BRB during fiscal years 2017 and 2018. BRB staff works immediately to address any questions regarding agency operations and data available on the agency website.

The chart below shows the average of the responses for each question. Responses of “does not apply” or omissions were not counted towards the averages. The agency did not receive any responses indicating a “below average” rating.



The BRB strives to be responsive to Texas taxpayers and citizens. All reports (searchable databases and agency publications) on state and local government debt are presented on the agency’s website and the Texas Open Data Portal. Visitors to the BRB website can search databases and access the Data Portal to download spreadsheets that contain debt data, detailed cost of issuance data, debt ratios, bond election information and population data by government type at fiscal year-end. The agency website is accessible to all users and complies with the Texas Administrative Code Section 213 - Electronic and Information Resources Accessibility Standards. Approximately 13,896 unique users were identified as using the BRB website from July 1, 2016 to May 9, 2018. BRB state and local debt data is also supplied to the Comptroller’s office and the Legislative Budget Board for publication on their debt website pages.

The BRB is constantly evaluating its internal processes for efficiency and effectiveness. In February 2014, staff began working to create a turnkey solution for the migration and consolidation of multiple state and local debt databases into one new SQL database with ad-hoc reporting capabilities. The new system was fully implemented in September 2016 and has facilitated real-time access to multiple years of current and historical debt data allowing BRB staff to produce reports in a timelier manner. This database upgrade has allowed staff to respond more efficiently to ad-hoc requests and conduct more detailed analysis on Texas’ overall debt picture.

The following tables show each question and the responses received.

Staff – Are the staff members helpful, courteous and knowledgeable?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	3	5	34	1

Facilities – Is the Board’s office accessible, clean and adequately equipped for your needs?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	1	9	12	21

Communications – Is communicating with the Board staff via telephone, mail or electronic mail a trouble-free and efficient process?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	3	7	32	1

Website – Is the Board’s website user friendly?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	8	17	15	3

Website (website2) – Does the site contain adequate information about the Bond Review Board and the services provided?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	7	11	22	3

Complaints – Are service complaints easy to file?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	2	2	4	35

Complaint Process (complaints2) – If you used the complaint process, was it resolved in a timely manner?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	2	2	1	38

Service Timeliness – Are Board staff members prompt in providing requested information?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	3	6	31	3

Printed Information – Are any reports, instructions or other printed information provided by the Board accurate and easy to understand?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	5	14	20	4

Data Portal – Is the Bond Review Board data available on the Texas Open Data Portal easily accessible?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	3	5	12	23

Representative Sample of Comments Received

- On each occasion when I visited or called the Texas Bond Review Board, I received courteous, prompt attention and came away with what I asked for. The staff members are exceptionally competent, and are well qualified for the important responsibilities that they have.
- Outstanding staff that is very easy to work with. Keep up the great work!
- I always appreciate the quick response from BRB staff and their willingness to take time to explain things.
- I wish I was as prompt at providing information to the BRB staff as they are in responding to me when I have needed information. Always a pleasure working with them - and they are very patient with me!
- Rob and Braxton have always been very knowledgeable, responsive and professional when corresponding with the TBRB on volume cap matters.
- My interactions with BRB staff have consistently been very positive. They are helpful, responsive and extremely knowledgeable. I also appreciate the BRB's ongoing CLE series- great topics and speakers!
- The Bond Review Board staff do excellent work on the Public Finance Seminars. I receive compliments from colleagues on the presentations and their value to state government staff working on public finance matters. There are few sources for this type of public finance related educational seminars for state employees.
- BRB staff have always been responsive and helpful.

Estimated Performance for Fiscal Year 2018

Outcome Measures

Percentage of surveyed customer respondents expressing overall satisfaction with services received.	100.0%
Percentage of surveyed customer respondents identifying ways to improve service delivery	5.0 %

Output Measures

Number of customers surveyed	436
Number of customers served*	13,896

Efficiency Measure

Cost per customer surveyed**	\$ 0.10
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Explanatory Measures

Number of customers identified*	13,896
Number of customer groups inventoried*	8

* Estimates based on contacts, performance measures, and number of unique hits to the agency website.

** Estimate – Survey is done online; cost reflects staff time to compile survey data.

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