

TEXAS BOND REVIEW BOARD

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REPORT ON CUSTOMER SERVICE

June 1, 2022

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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, including concerned citizens, academic professionals, and students, 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 9, 2022, emails were sent out to 471 customers of the BRB requesting that they complete the survey online. Responses were received from 50 recipients for a response rate of 10.6%. The last response was received on April 8, 2022.

The survey included queries on service areas, facilities, staff, communications, the agency's website, complaint handling processes, timeliness, printed information, and overall satisfaction. 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 2020. 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.

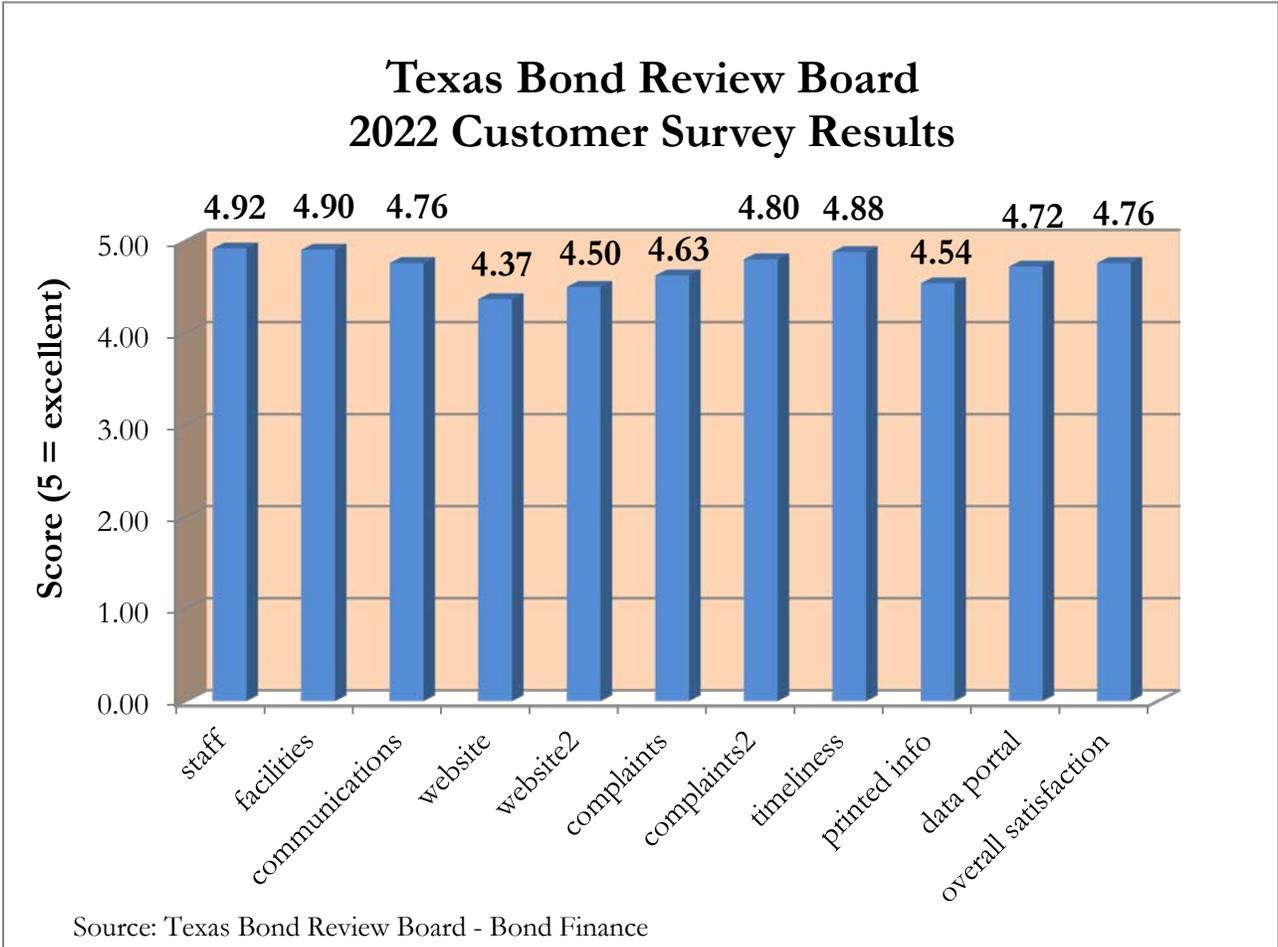
Customer Satisfaction Findings

The agency sent emails to 471 recipients requesting completion of the online survey and received 50 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 facilities, communications, timeliness, and overall satisfaction in providing requested information. The sample size for ease of filing service complaints (shown as "complaints" in the chart) was small with 84.0% 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 90.0% of the respondents selecting "does not apply". No complaints were filed with the BRB during fiscal years 2021 and 2022. BRB staff works immediately to address any questions regarding agency operations and data available on the agency website.

The agency’s website, including overall look and feel and organization of information, was one area of improvement noted several times by BRB customers. As a result, staff is working to modernize and reorganize the agency’s website. Staff is working with a web developer from Dynamic Computing Services (DCS) Corporation to manage this project. The new website should go live during the early part of summer 2022.

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. An average of 4,134 unique users per month were identified as using the BRB website from January 1, 2021 to April 30, 2022. 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.

In September 2016, the agency consolidated multiple state and local debt databases into one new SQL database with ad-hoc reporting capabilities. The new system 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 BRB was appropriated funds for the fiscal year 2020-21 biennium to upgrade its website. With this appropriation, the BRB created a new data center website that went live in December 2020. This upgrade further increased transparency for Texas state and local debt information and consolidate the reporting of this information into one centralized location on the agency's website, allowing the user to search for debt data via a dossier-style display. The data center website allows the user to view comparative graphs and charts integrating fees, debt issuance, and debt outstanding information onto one page helping the user better understand the overall debt picture of each state and local debt issuer. Users of the new website can download xls/csv data for each graph and chart displayed. The new website was built to receive nightly updates from the on-premises database to keep the data up-to-date.

The following tables show each question and the responses received.

Staff – Are the staff members helpful, courteous, and knowledgeable?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	0	0	4	45	1

Facilities – Is the agency's office accessible, clean, and adequately equipped for your needs?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	0	0	2	19	29

Communications – Is communicating with the agency staff via telephone, mail, or electronic mail a trouble-free and efficient process?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	0	0	12	38	0

Website – How satisfied are you with the usability of the agency's website, including mobile access to the site?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	3	3	16	27	1

Website (website2) – Does the website contain adequate information about the Bond Review Board and the services provided?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	2	3	12	31	2

Complaints – Are service complaints easy to file?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	0	0	3	5	42

Complaint Process (complaints2) – If you used the complaint process, was your complaint resolved in a timely manner?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	0	0	1	4	45

Service Timeliness – Are agency staff members prompt in providing requested information?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	0	0	6	44	0

Printed Information – Are all reports, instructions or other printed information provided by the agency accurate and easy to understand?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	1	3	14	32	0

Data Portal – Is the Bond Review Board data available on the Texas Open Data Portal and Data Center easily accessible?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	0	1	8	27	14

Overall Satisfaction – Please rate your overall satisfaction with the agency?					
<u>Poor</u>	<u>Below Average</u>	<u>Average</u>	<u>Above Average</u>	<u>Excellent</u>	<u>Does Not Apply</u>
0	0	0	12	38	0

Representative Sample of Comments Received

- BRB knows their stuff and is always on top of questions and requests. I could not tell if they were in or out of the office, responses were 100 percent seamless.
- It's always a pleasure to deal with the BRB and their staff.
- We work with many outside entities. The Texas Bond Review Board has consistently been the easiest to work with and the most helpful.
- The website can be improved. The staff response is excellent.
- There was a typo error on a city's bond issue and the BRB corrected it quickly. Thank you.
- An easy to understand outline or summary of timing for the program would be helpful. i.e. submission deadlines, lottery/collapse dates, filing/closing deadlines, and particular carryforward timing, etc.
- Great experience and staff is very helpful in answering questions, promptly responding to emails and providing guidance on the private activity bond process.
- Jamie Backiel is always pleasant to speak with and is always prompt in answering questions and helping to resolve issues. She also gives very thorough instructions and is overall, very easy to work with!

- Jamie and Rob are doing a great job!
- My only comments would be that some of the more nuanced information on the PAB program could be more easily accessible. Primarily regarding the number reordering and priority boosts that occur post-bond lottery.
- I was completely unaware of the Texas Open Data Portal and Data Center until now, so maybe better advertising? Staff are great, and ready willing and able to answer questions. Sometimes the information on the website feels a little limited.
- Many thanks to the wonderful BRB and supporting staff!
- Thank you!

Estimated Performance for Fiscal Year 2022

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	8.0 %

Output Measures

Number of customers surveyed	471
Number of customers served (monthly average)*	4,134

Efficiency Measure

Cost per customer surveyed**	\$ 0.10
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Explanatory Measures

Number of customers identified (monthly average)*	4,134
Number of customer groups inventoried*	8

* Estimates based on contacts, performance measures, and a monthly average of unique hits to the agency website between January 1, 2021 and April 30, 2022.

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

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