

# **TEXAS BOND REVIEW BOARD**

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## **REPORT ON CUSTOMER SERVICE**

June 1, 2016

# TEXAS BOND REVIEW BOARD

## 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 1<sup>st</sup> 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 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 outstanding and 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 federal tax-exempt bond programs.

### **Information Gathering Methods**

The BRB has had an online customer service survey available since the agency's website was redesigned in 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](http://www.brb.texas.gov).

On March 23, 2016 emails were sent out to 234 customers of the BRB requesting that they complete the survey online. Responses were received from 45 recipients for a response rate of 19.2%, comparable to the rate of 17.3% for the last biennia. The last response was received on April 29, 2016.

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 2014. 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.

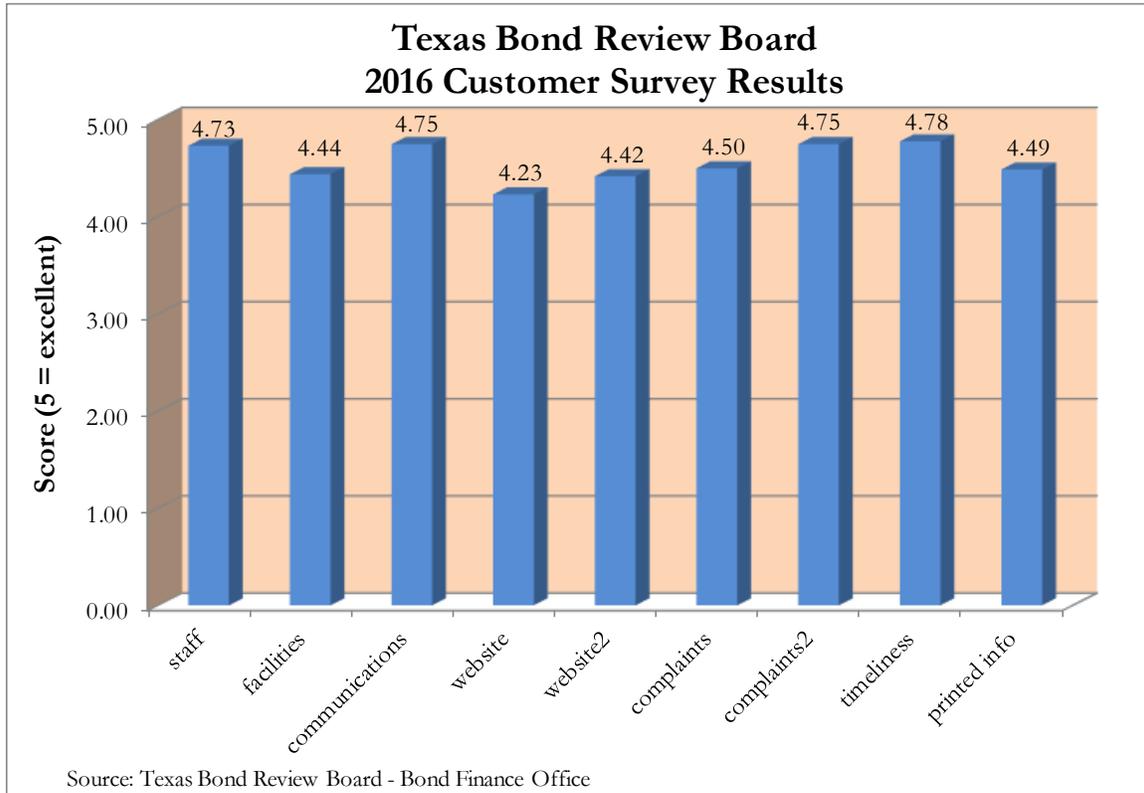
The BRB also administers the state's CEP in conjunction with the Texas Higher Education Coordinating Board. All state agencies and institutions of higher education that have plans to purchase land, buildings or information systems in excess of \$1 million are required to file this report with the BRB.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

### **Customer Satisfaction Findings**

The agency sent emails to 234 recipients requesting completion of the online survey and received 45 responses. Five was the highest rating available in a customer-service quality element, and the BRB chose a rating of three as the minimal level of 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 77.8% 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 82.2% of the respondents selecting "does not apply". No complaints were filed with the BRB during fiscal years 2015 and 2016. 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 received 2 responses indicating a “below average” rating. One response was related to the agency’s facilities and the other response was related to the agency’s website user friendliness (shown as “website” in the chart).

The BRB strives to be responsive to Texas taxpayers and citizens. Agency reports and local debt data are available on its website which was redesigned and upgraded during fiscal year 2016 to provide greater ease of use by the public. The agency website is accessible to all users and complies with the Texas Administrative Code Section 213 - Electronic and Information Resources Accessibility Standards. Approximately 37,068 unique users were identified as using the BRB website during fiscal years 2015 and 2016.

The BRB is constantly evaluating its internal processes for efficiency and effectiveness. BRB staff is currently working to consolidate its multiple databases into one new database with ad-hoc reporting capabilities that will facilitate real-time access to multiple years of current and historical debt data. This database upgrade will improve the collection and reporting of state and local debt information and allow staff to respond more efficiently to ad-hoc requests and conduct more detailed debt analysis.

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	6	36	0

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	1	2	7	15	20

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	5	36	1

Website – Is the Board’s website user friendly?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	1	8	14	20	2

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	8	9	26	2

Complaints – Are service complaints easy to file?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	2	1	7	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	1	0	7	37

Service Timeliness – Are Board staff members prompt in providing requested information?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	2	6	37	0

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	7	8	28	2

**Representative Sample of Comments Received**

- It's always a pleasure interacting with everyone from the Bond Review Board. Everyone is pleasant, professional and extraordinarily helpful.
- BRB is one of the most efficient state agencies to work with on complex financial transactions.
- I've made a number of information requests to the BRB over the last few years and have always had excellent service.

- Ms. Jodee Martinez knows USAS and USPS. She has provided her expertise to myself and our agency. A great teacher and listener.
- Mr. Justin Groll was glad to help in the utmost manner. I would like to congratulate him on his diligence and professionalism.
- I work frequently with Rob Latsha, and he does an absolutely fantastic job for the Bond Review Board. He is extremely knowledgeable about private activity bonds and the volume cap process but not only does he have the knowledge himself, he is also very willing to answer questions and explain the required processes and deadlines to users.
- I have always received great customer service from the staff for help with the Capital Expenditure Plan.

**Estimated Performance for Fiscal Year 2016**

**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	234
Number of customers served*	37,068

**Efficiency Measure**

Cost per customer surveyed **	\$ 0.10
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**Explanatory Measures**

Number of customers identified*	37,068
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.

**Customer Service Representative**

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