DATE: February 13, 2019

MEMO TO: MROSD Board of Directors

THROUGH: Ana Ruiz, AICP, General Manager

FROM: Jordan McDaniel, Public Affairs Administrative Assistant

SUBJECT: Customer Relationship Management System and General Information Emails

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CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM DEVELOPMENT

The General Information email address (info@openspace.org) is a tool used by the public to submit requests, inquiries, compliments, or complaints to the District. This email account also captures messages received via an online contact form on the District website. The General Information email is monitored and managed by Public Affairs staff.

Implementation Guideline 12 of the District's Good Neighbor Policy states: "Throughout the year, the District will also gather information and suggestions that neighbors provide to staff in person or send in via the Web site, e-mail or regular mail." Until recently, Midpen lacked a central repository for collecting and organizing public requests, inquiries, compliments or complaints received through the General Information email. This has led to incomplete annual reports due to difficulties in compiling reference materials. In addition, the prior system lacked the ability to provide pre-established standard messaging to ensure that each message receives an acknowledgement of receipt, as well as a way to track custom responses prepared by District departments.

In June 2017, staff researched off-the-shelf software solutions for a customer relationship management (CRM) system, ultimately deciding to build a custom database that would integrate into the District's existing SharePoint system.

CRM Project Timeline

July 2017	Identified CRM system criteria and functional components
August 2017	Began IST development of SharePoint solution
October 2017 – May 2018	Tested system and made modifications
April 2018	Presented to Management Team for approval
May 2018	Trained staff
June 2018	Launched system

Current Status

The first phase of assigning and tracking emails that require department/staff input is now live. The next iteration will capture the more general inquiries answered by Public Affairs and provide enhancements for tracking inquiries sent to other departments for input. Those inquiries are currently manually tracked on a separate spreadsheet, then integrated at the end of the year in a final report. This next phase is scheduled to begin prior to June 2019, when the rollout of a work order asset management system will be implemented to capture and manage service-related requests. During this evaluation period, we will work to determine feature enhancements for all other, non-service-related requests or general inquiries. The District may look at another third party solution if the SharePoint platform is unable to provide the desired functionality.

GENERAL INFORMATION EMAILS - RECAP

General Information emails primarily contain questions, comments and requests from the public on a variety of topics. Notably, most emails relate to dog access, trail maintenance, permits, newsletters, wildlife, drones, waste management, and citations.

In 2018, staff received 695 General Information emails. Roughly a quarter (23%) of these emails required an in-depth or project-specific response and were forwarded to other departments for input. Public Affairs staff handled the rest.

Staff responded to 93% of General Information emails within two business days, exceeding the performance metric (90%) outlined in the Budget and Action Plan FY2018-19. On average, Midpen staff responded to General Information emails in 1.2 days, including weekends and holidays. Anecdotally, senders often express appreciation for our timely and thorough responses.

2018 General Information Email Metrics

Assigned Department	Emails Received	Percentage	Average Response Time (Days)
Public Affairs	534	77%	1.2
All Other Departments	161	23%	1.5
COMBINED	**695**	**100%**	**1.2**

NEXT STEPS

In 2019, staff will evaluate the CRM system as currently designed to determine whether the system meets our needs or requires additional modification.

Responsible Department Head:
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