



**DEPARTMENT OF BUDGET AND MANAGEMENT**  
**Customer Service Annual Report**

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## FY18 Highlights

### Department-Wide

- 100% participation in customer service training among required employees
- 82% overall satisfaction rate with customers' interactions with DBM, with more than 45 employees receiving positive feedback on customer service surveys
- 54 employees celebrated State employment anniversaries this year, including two who have been State employees for 45 years
- Employee recognition picnic allowed employees from all divisions to gather and celebrate what makes DBM great—the amazing people who work here

### Office of the Secretary

- Organized six “road trips” for the Secretary to tour capital projects, meet with elected officials, and hold roundtable discussions with local business owners
- Responded to 343 constituent correspondences dealing with topics like budget requests, debt collection, and State employment matters

### Office of Personnel Services and Benefits (OPSB)

- Implementation of pilot program for online employee benefits management through the Workday platform has streamlined previously cumbersome and time-consuming manual benefits selection process
- OPSB executive director presented with Governor's Citation at Baltimore City Cabinet meeting
- OPSB employee named this year's winner of DBM's Diane Bell Memorial Award
- Maryland State jobs social media accounts reach up to one million individuals
- “OPSB STARS” recognized around the office and in the departmental newsletter

### Central Collection Unit (CCU)

- Finalizing implementation of a modernization project that will incorporate a new phone/IVR system to handle customer calls more quickly and effectively

### Division of Procurement Policy and Administration (DPPA)

- Coordinating Maryland's procurement reform process to make it faster, less burdensome, and more straightforward to do business with State government

### Office of Budget Analysis (OBA)

- Launched a new budget system that will make it easier for State agencies to prepare, understand, and implement their budgets each year

### Office of Capital Budgeting (OCB)

- Revamped agency capital budget training process to enable more individualized online seminars and allow for quicker understanding of the Capital Budget Information System

### Office of Finance and Administration (OFA)

- OFA employee presented with Governor's Citation for community service

## Recognition Given to Employees

### The Diane Bell Memorial Award

The Diane Bell Memorial Award was established in January 2009 to honor a wonderful member of the DBM family who passed away in September 2008. Diane was widely known and well respected within the Department for her dedication, commitment to excellence, knowledge, hard work, professionalism, and excellent customer service skills. This Award honors her memory by recognizing in other DBM employees the qualities that made Diane so exceptional.

The recipient of the 2017 Diane Bell Memorial Award was Fran Melchior.



Fran has been a State employee since 1988, having spent her entire career with DBM. She is currently a supervisor in the Employee Benefits Division of OPSB. It is important to note that two individuals who are supervised by Fran nominated her for this Award separately and without knowledge of the other's actions. This should tell you the esteem in which she is held by her colleagues. In these nominations, Fran was described as a professional who cares about her job and displays a deep commitment to the people with whom she works. She is friendly and knowledgeable and willing to help anyone at any time. More recently, Fran has become a key player in the Statewide Personnel System (SPS) project. The current phase is online benefits and Fran's participation has proven to be very valuable.

The other nominees were:

- Susan Gore, Office of Capital Budgeting;
- Jennifer Hine, Personnel Services Division, OPSB;
- Jaime Isaacs, Central Collection Unit;
- Shaun O'Brien, Recruitment and Examination Division, OPSB; and
- Kathleen Weissner, Shared Services Division, OPSB.

Recognition must also be given to the members of the award committee, each of whom took the time to review submissions and put forward a nominee. This year, the Committee members were:

- Kwame Kwakye, Office of Capital Budgeting;
- Tom McLamore, Division of Procurement Policy and Administration; and
- Cynthia Tucker, Classification and Salary Division, OPSB.

Each of these individuals volunteered their time to serve on the Committee and we appreciate the time that they took out of their busy schedules to participate in this process.



## OPSB STARS



Since 2004, the Office of Personnel Services and Benefits has had a bulletin board posted outside their executive office on the 6<sup>th</sup> floor of DBM's Baltimore location at 301 W. Preston Street on which executive personnel share positive feedback that has been received regarding the efforts of specific employees. The individuals named in this feedback are referred to as OPSB STARS, or employees who are worthy of "Special Thanks And Recognition."

When the program began, there was only the one bulletin board, but as some OPSB units began to move to different floors in the building, executive leadership wanted to ensure that all employees could still be recognized on an OPSB STARS board on their floor. This resulted in the addition of two more boards to the Personnel Services Division on the 7<sup>th</sup> floor and the Shared Services Division on the 5<sup>th</sup> floor.

Following the announcement of Governor Larry Hogan's Customer Service Initiative, the program has grown exponentially, and it is now rare to see one of the bulletin boards with empty space on it, due to the sheer amount of positive feedback that is received on a regular basis.

DBM attributes this uptick to three major factors. The first is the Customer Service Initiative itself. By reminding State employees of the most important element of their jobs—the “service” part—Governor Hogan has begun to transform the way we approach all interactions with our customers. The required customer service training lesson has played an important role in demonstrating to DBM employees just what that means, and it has become clear that we have embraced that message.

Moreover, since late 2015, we have been incorporating the OPSB STARs recognition into our departmental newsletter by sharing a link to a presentation that displays all the OPSB STARs feedback received over the previous three months. We believe that this practice has encouraged DBM employees to improve their customer service both by reinforcing the recognition already garnered through the use of the bulletin boards in OPSB and by exposing DBM employees outside of OPSB to the recognition that their colleagues are receiving.

Finally, with the launch of the Customer Service Initiative, we began sharing the feedback received as part of DBM customer service surveys with the named employees and their supervisors. Because their work puts them in contact with members of the general public more frequently than other DBM employees, OPSB employees often receive more survey feedback than those in other divisions, and executive personnel at OPSB have begun to add these survey responses to the OPSB STARs boards. This increased awareness of the customer service survey creates a kind of loop that builds on itself as more and more employees see the recognition that their colleagues are receiving, which drives them to want to perform their jobs better in the hopes of being recognized in the same way.

OPSB executive personnel believe that the OPSB STARs program, combined with the Governor’s Customer Service Initiative, has begun to foster a new era of employee recognition, with many employees now asking for copies of these write-ups to be included in their personnel file. Moving forward, DBM will continue to look for novel ideas like this to recognize stellar efforts from our employees and demonstrate the importance of adherence to the true meaning of good customer service in State government.



### Employee Appreciation Picnic



DBM has enjoyed a celebratory picnic for Employee Appreciation Day for at least the past eight years. The location has varied; however, it usually takes place at an outdoor venue. This has also been the time when milestone service awards and the Diane Bell award are presented. Secretary Brinkley recognizes each recipient individually and then presents them with their certificate.

In 2018, the Employee Appreciation Picnic was once again held in the Pickall Area of Patapsco Valley State Park. We were provided with a private area housing two large shelters, two oversized grills, and a nearby beach volleyball court. It was a perfect space to host the DBM employees, family and friends. The weather was picture perfect for the cookout. People were playing badminton, corn hole, volleyball and Family Feud. The two large grills were fired up, cooking hamburgers and hot dogs. The spread of food included two kinds of potato salad, green salad, jars of dill pickles, baked beans, fruit and veggie trays, veggie subs, cookies, cake, cake pops and pie.

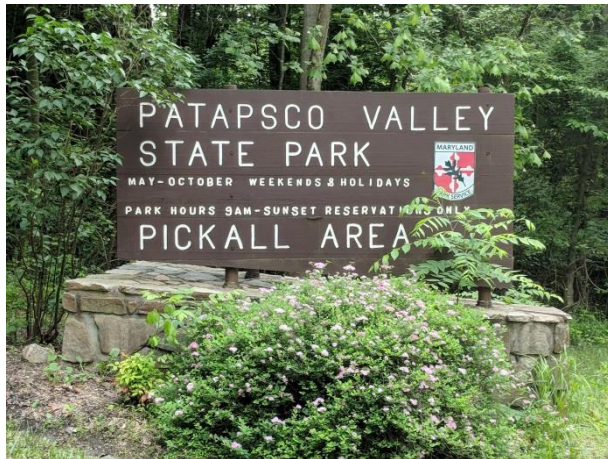
Making this all happen takes a dedicated team of people. This year, the members of the picnic planning committee were:

- Jim Fox, Employee and Labor Relations Division, OPSB;
- Dyonna Jackson, Classification and Salary Division, OPSB;
- Lynnetta Johnson, Central Collection Unit;
- Dan Musselman, Classification and Salary Division, OPSB;
- Joshua Nolet, Employee and Labor Relations Division, OPSB;
- Shaun O'Brien, Recruitment and Examination Division, OPSB; and
- Paula Webber, Office of the Secretary.

Others that contributed on the day of the event included:

- Kim Bolan, Personnel Services Division, OPSB;
- Marcy Hersl, Personnel Services Division, OPSB;
- Angie Hill, Shared Services Division, OPSB;
- Jennifer Hine, Personnel Services Division, OPSB;
- Aaron Miller, Classification and Salary Division, OPSB;
- Kim Scott, Office of the Executive Director, OPSB;
- Jason Shrader, Classification and Salary Division, OPSB;
- Mark Townend, Recruitment and Examination Division, OPSB; and
- John West, Office of Finance and Administration.

Theresa Coffey (Division of Procurement Policy and Administration) and Nicholas Pepersack (Office of the Secretary) took pictures. Also, special thanks to Betty McGill (Personnel Services Division, OPSB) who creates the award certificates every year.



Service Milestone Awards

At the 2018 DBM Employee Appreciation Picnic, the following individuals were named, thanked by Secretary Brinkley, and presented with an award commensurate with their years of service in State government.

**5 YEAR AWARD**

Hisham Amin, OAG  
Amy Angst, OPSB  
Mytiaria Berry, OPSB  
Theresa Coffey, DPPA  
Britney Davis, OPSB  
Wilma Edelenbos, CCU  
Brandi Evans, CCU  
Heather Harrison, OPSB  
Rachel Hershey, DPPA  
Dyonna Jackson, OPSB  
William Lake, CCU  
Aaron Miller, OPSB  
Rhonda Murray, CCU  
Laura Piper, CCU  
Matthew Stockwell, DPPA  
Nicole Webb, OSEEOC  
Jamilie Wilson, CCU

**10 YEAR AWARD**

Enjoli Boyd, OAG  
Margaret Galloway-Francies, CCU  
Dick Ihrie, Secretary's Office  
Anthony McLamore, DPPA  
Elizabeth Robinson, OPSB  
Kellice Seymore, OPSB  
Ashley Stevens, CCU  
Michele Thomas-Rojas, OAG  
Jamie Tomaszewski, DPPA  
Barbara West-Davis, CCU  
Jeff Wulbrecht, OBA

**15 YEAR AWARD**

Redonna Ford, CCU  
Yvette Romero, OPSB  
Jacqueline Wallace, OPSB

**20 YEAR AWARD**

Liz Cohen, OPSB  
Tamar Duppins-Stokes, OPSB  
Laurie Feldman, CCU  
Yolanda Hill, CCU  
Charles Kess, CCU  
Rick Loseman, OPSB  
Tonya Nguyen, CCU  
Barry Prevost, CCU  
Mark Townend, OPSB  
Paul Webb, Sr., OPSB  
Carole Wollenweber, OPSB

**25 YEAR AWARD**

Cecelia Smith, OPSB

**30 YEAR AWARD**

Angela Davis, OPSB  
Kim Grandy, OBA  
Cynthia Tucker, OPSB  
DeNean Washington, OPSB

**35 YEAR AWARD**

Wanda Bivens, OPSB  
Sheryl Hagood, OPSB  
Mary Naramore, DPPA

**40 YEAR AWARD**

Leon Dennis, OPSB

**45 YEAR AWARD**

Kathleen Mettee, CCU  
Teresa Sullivan, DPPA



### Survey Feedback Notifications

Following the implementation of department-specific customer service surveys, personnel from DBM's communications office have begun to notify specific employees and their supervisors when they have been received positive feedback in a customer service survey response. In these notifications, the employees are shown the text of the survey response comments, thanked for their quality customer service, and encouraged to maintain that level of commitment to the Governor's Customer Service Initiative moving forward.

The following DBM employees have been named in customer service survey responses as having provided constituents with exceptional customer service—many on more than one occasion—and congratulated with a personalized notification from the communications office:

Christina Beck, CCU  
April Bevans, CCU  
Wanda Bivens, OPSB  
Nathan Bowen, OBA  
Fiona Burns, OCB  
Denise Carter-McCormick, OPSB  
Jeffrey Corrigan, CCU  
Leon Dennis, OPSB  
Kimberly Ey, CCU  
Jesse Filamore, OPSB  
Montez Foster, CCU  
Michael Friedman, OAG  
Renee Hammock, OPSB  
Heather Harrison, OPSB  
Anne Heim, CCU  
Rachel Hershey, DPPA  
Marcy Hersl, OPSB  
Lanora Hicks, OPSB  
Cheryl Hill, OPSB  
Jennifer Hine, OPSB  
April Hughes, CCU  
Danyelle Jackson, OAG  
Lisa Jenkins, OAG

Lynnetta Johnson, CCU  
Suzette Johnson, CCU  
Amanda Karnezis, OPSB  
Jesse Lawyer, CCU  
Julie Lesko, OPSB  
Pam Malech, DPPA  
Fran Melchior, OPSB  
Barbie Middleton, OPSB  
Joshua Nolet, OPSB  
Shaun O'Brien, OPSB  
Robin Payne, OPSB  
Nicholas Pepersack, Secretary's Office  
Mary Plunkert, OPSB  
Yvette Romero, OPSB  
Brenda Salas, OPSB  
Stacey Saylor, OPSB  
Jacqueline Wallace, OPSB  
Kathleen Weissner, OPSB  
Kim Williams, OPSB  
Tim Yersin, OPSB  
Kelly Valentine, OPSB  
Shirley Williams, OPSB  
Mike Yeager, DPPA

## External Recognition

### **CINDY KOLLNER'S GOVERNOR'S CITATION**

As part of the Governor's regional cabinet meeting in Baltimore City in June of 2018, DBM was asked to submit the name of a State employee from the region who has best exemplified the principles of Governor Hogan's Customer Service Initiative in his/her work on behalf of Marylanders.

Out of all the nominees, the Governor selected some to be honored with congratulatory citations thanking those individuals for their efforts, and DBM's nominee was one of the individuals selected to receive a Governor's Citation for Customer Service.

DBM's nominee was Cindy Kollner, the Executive Director of our Office of Personnel Services and Benefits in Baltimore City.



Cindy has been an integral member of DBM's senior staff under Governor Hogan. In addition to managing the most wide-ranging division within the Department, Cindy has acted as the Governor's chief negotiator with the various exclusive bargaining units for State employees. When challenged by union representatives on the Administration's stance on various collective bargaining issues, Cindy has maintained the utmost levels of professionalism and respect.

In addition, Cindy has been personally overseeing the implementation of the Workday cloud-based HR management system throughout all of State government. Since implementation began, Cindy has been willing to answer questions from anyone about anything related to the rollout in dedication to making sure that all those who will be impacted by the transition to Workday understand what is going on and how much this new system will improve upon the old.

The Department of Budget and Management is thrilled that Cindy was selected to receive a Governor's Citation for Customer Service. Governor Hogan himself presented Cindy with her citation at the Baltimore City Cabinet Meeting. We hope that Cindy's example inspires other employees to consider how they are living the ideals of the Customer Service Initiative in all that they do on the job here at DBM.

### **KATHY THOMSON'S GOVERNOR'S CITATION**

As part of the Governor's regional cabinet meeting in Calvert County in March of 2018, DBM was asked to submit the name of a State employee from the region who—in addition to acting as a public servant on the job—has shown a dedication to serving their community during their personal time as well.

Out of all the nominees, the Governor selected some to be honored with congratulatory citations thanking those individuals for their efforts, and DBM's nominee was one of the individuals selected to receive a Governor's Citation for Community Service.

DBM's nominee was Kathy Thomson from our Office of Finance and Administration in Annapolis.



For several years now, Kathy has been a volunteer with Pets on Wheels. Every Tuesday, Kathy takes her dog—a half-poodle, half-Maltese named Knight—to the Sunrise Assisted Living Facility on Bestgate Road in Annapolis. Knight has gone through special training to become a certified therapy dog, which taught him how to provide affection and comfort to those in need. Kathy and Knight spend about two hours each week visiting the residents of the facility. Knight loves spending time with the seniors, and they respond very well to him. It's well known throughout the facility that the residents really look forward to their Tuesdays with Kathy and Knight.

The Department of Budget and Management is thrilled that Kathy was selected to receive a Governor's Citation for Community Service. Secretary Brinkley presented Kathy with her citation at DBM's Employee Appreciation Picnic in June of 2018. We hope that Kathy's example inspires other employees to give back to their communities on their own time in addition to the service they provide to Marylanders in their day jobs.

\* \* \* \* \*

# Thank You



Since being appointed Secretary, I have maintained that DBM is the best-run agency in State government! And that's because of the hard work and tireless dedication of each and every State employee who works in our offices. Every DBM employee truly understands what it means to be a public servant. Even if their names are not mentioned in this report, we appreciate all our employees and the thankless work they perform every day in service of all Marylanders!

David R. Brinkley  
Secretary



## Leadership Analysis of FY18 and Summary of FY19 Approach

DBM is uniquely positioned when it comes to following the tenets of Governor Hogan's Customer Service Initiative because most of our "customers" are actually employees of other State agencies. That is not to say that we do not interact with the public—in fact, our CCU is dedicated solely to collecting qualifying State debts from individuals, and OPSB provides important services to people involved in all aspects of State employment, from job-seekers to current State employees to people who have retired from their service with the State government alike. As such, any analysis of DBM's past results and any game plan for laying out our future approach must account for the fact that most of our "customers" do not meet the typical definition that other agencies employ and must adjust our tactics and expectations accordingly.

For example, even though the Governor's Office excludes them in the "official" calculation of overall satisfaction rating—for understandable reasons—DBM has decided that it is necessary to account for all internal customer service survey responses submitted for our agency from employees at other State agencies in the following detailed analysis because of the critical role that our actions play in ensuring the smooth performance of the daily duties of these "customers."

When it comes to keeping up to date with the completion of the online customer service training lesson for new hires, DBM is proud to have found a system that works and that can be easily replicated month after month, especially given the challenges we faced attempting to ensure 100% compliance the first time around in the waning days of FY17. Upper-level departmental management has truly bought into the importance of the training, as we've found that looping in the supervisors of any stragglers results in prompt completion of the lesson.

We also stand by the existing process for responding to constituent correspondences, even though we have not experienced the progress made toward reducing overall time to resolution that we would like to see. While we certainly work to limit their impact on our response times, some of the challenges that DBM encounters—for instance, when it comes to responding to individuals and interest groups about funding in the State budget—are immutable facts of life for us here at DBM. On the positive side, as the vast majority of these budget requests come from veteran lawmakers, long-standing advocacy groups, or experienced lobbyists, they are all aware of how the budget process works in Maryland, so we do not believe that a slightly longer turnaround time than we desire has had any impact on their impressions of DBM's responsiveness.

All that being said, however, we still see great opportunities for improvement in the coming fiscal year and beyond.

Once we see a full year's worth of data on the new "ease of use" survey question, we'll be able to conduct a better analysis of where DBM's customers are having difficulties in their interactions with us and, as a result, we'll work with those elements within our agency to better formulate a plan of attack to address those challenges. This may also

require us to ask DoIT to enable division-specific tracking of survey responses within DBM, as certain other agencies have done with their own internal divisions. We anticipate that doing so would reduce the number of vague survey responses we receive that make it difficult to understand why the constituent was interacting with us who the constituent dealt with. This will allow us to get a clearer picture of our employees' interactions with our customers from start to finish.

One of the steps we'll be taking to improve those interactions will, of course, be with our online customer service training. While the current training lesson for new hires provides a good foundation based on solid customer service fundamentals, we will be looking into the possibility of expanding our customer service training options with a more in-depth training lesson for those employees who deal more frequently with the public. Just as important, though, will be the implementation of a "refresher" course for those employees who have been with us since the beginning of the Customer Service Initiative and may need to brush up on those very fundamentals that our initial training lesson touches upon. With these changes in mind, we expect to see a strong uptick in the satisfaction rating of our survey responses over the course of FY19.

Finally, we will also be looking to make strong strides in reducing our overall time to resolution for constituent correspondences. Understanding the challenges DBM faces when it comes to nearly half the letters and emails we receive from constituents, we will be targeting the other half in an attempt to get those correspondences in the hands of the appropriate individuals here at DBM as soon as we can in order to get responses drafted and mailed faster than we have been. We understand that the everyday Marylanders who write to us or to Governor Hogan about some item in the budget that's important to them expect a speedy but thorough response to their queries, and we here at DBM will make every effort we can in FY19 to make that happen for them.

All employees at DBM take the elements of the Customer Service Promise seriously and work every day to provide our customers—whether they are members of the general public or employees at other State agencies—with the highest caliber service we can. With the first full year of the Customer Service Initiative under our belts, we believe our FY18 results form a strong base upon which we can build toward great improvements in FY19, and we are eager to see what we can accomplish in coordination with the rest of Governor Hogan's administration in bringing even greater service to the people of Maryland.

## Detailed FY18 Results and FY19 Plans

### Customer Service Survey Results

#### **FY18 RESULTS**

As stated in the leadership analysis, DBM is more likely than most agencies to receive survey responses from employees at other State agencies. This was borne about by our most recently received database of responses, in which more than 10% of entries were listed as “Internal”—in other words: coming from an employee at another agency.

As a result of this, we decided to include those internal responses in our calculations. We determined that the benefits of getting a better picture of just whom DBM serves and what they think of that service we are provided far outweighed any potential for fellow State employees who are familiar with the Customer Service Initiative and what the survey responses are used for to game the system by providing higher rankings than what our employees truly earned.

Based on that data, we can calculate that 82% of survey respondents were satisfied with the quality of the overall customer service experience that they received from DBM employees, while only 16% expressed their dissatisfaction with the way they had been treated during the course of their interaction with DBM.

If any individuals from that 16% provided contact information, members of the communications office followed up with them to determine what the nature of their grievances were with their treatment and to inquire if they needed any additional assistance at the moment or if their interaction with DBM had been completed, though follow-up responses to these emails have been exceedingly rare. Upon examination of the comments left by those who said they were dissatisfied with the customer service they received, it was determined that, in a great number of cases, the reason for the dissatisfied rating had less to do with the actual customer service provided to the individual and more to do with an outcome that was not to their satisfaction. While there will always be some individuals who use this customer service survey to provide negative feedback because they did not get the outcome they desired, it is important to note that we take all of the dissatisfied ratings very seriously and will attempt to investigate them all to determine what, if anything, DBM personnel could have done better in our interactions with said individuals.

It must be noted that this 82% overall satisfaction rate does represent a 1% drop from DBM's FY17 level; however, we are not concerned that this is the result of any negative changes in the way that our employees treat constituents. Rather, we view this as a more accurate representation of where DBM's true customer satisfaction rating lies. In addition to the fact that this data represents a full year of surveys compared to last the six months of data that was available as of the submission of the FY17 report, DBM receives relatively few surveys when compared to other State agencies that interact directly with hundreds of thousands, or even millions, of Marylanders. In reports issued by the Governor's Office, it is routinely noted that larger State agencies receive over a

hundred survey responses a week on average, whereas DBM average only 7.5 surveys per week this fiscal year. With this level of responses, it does not take much to move the needle one way or the other.

Overall, we are proud with the results of the first full year of customer service survey responses. The results are not unexpected, but we are glad to see confirmation of the quality of the customer service that our employees are providing now that we have fully implemented the various aspects of Governor Hogan's Customer Service Initiative.

### **FY19 PLANS**

Over the course of FY 2019, we will continue to analyze the data brought in from future customer service survey responses in an attempt to highlight specific strengths of DBM's interactions with our customers and pinpoint the weaknesses where we could stand to improve.

We will investigate the possibility of using paper surveys as some other agencies have done to better gauge our in-person interactions between constituents and walk-ins at our main office locations in Baltimore City and at our MVA-based Central Collection Unit satellite locations. This would help us capture the opinions of a greater number of our "customers" who otherwise would not deal with our employees over email and would, thus, not have access to the survey link in our email signatures.

We will continue to maintain on ongoing spreadsheet tracking the overall satisfaction rating and the new "Ease of Use" rating in great detail over time—making sure to note any major announcements or developments related to DBM's work in order to better understand how what we are doing as an agency is impacting the lives of the people we serve. This will also help us to see movement across the board as it happens and empower us to respond to any failings in as close to real time as possible.

We will also continue to share internally the comments left by constituents, both positive and negative, to reinforce the importance of positive customer service in every interaction we have, because you never know who will take the time to complete a survey response and how your treatment of that customer will impact the ratings received by the entire department. As stated in the Recognition Given to Employees section, we have been forwarding the positive remarks to the employee and their supervisor and the negative remarks specifically to the supervisor with the request that they follow up with the employee about the issue directly, and we will do so for FY 2019 as soon as we receive the individual Mail IQ service from the Governor's Office or we receive the weekly summary spreadsheet of survey responses, whichever comes first.

## Status of Customer Service Training

### **FY18 RESULTS**

During the 2017 Fiscal Year, personnel from DBM joined employees from across State government to put together a one-size-fits-all online customer service training lesson that agencies can use as the foundation for a sound, ongoing training platform. This year, we worked to perfect our system of training new employees using this lesson.

As part of the implementation of the Customer Service Initiative, representatives from DBM's communications office began the process of ensuring that all DBM employees completed this online lesson before the submission of this report. After discussion with the OPSB executive office, it was determined to assign this lesson to DBM employees through the State's new learning management system, The Hub. This decision made it relatively simple to track completion progress over the summer and allowed us to quickly follow up with any employees who had been listed as "Not Completed," along with their supervisors.

For FY18, DBM has once again achieved 100% completion of the online customer service training lesson from all required employees. At the time of this writing, there are two new hires who were just brought on who have not yet completed the training and two others who are in the 30-day grace period who will do so by the end of the month.

Feedback from employees about this training lesson has been overwhelmingly positive, with many appreciating the light-hearted nature of it, compared to the dullness that many have come to expect from required office training. That is not to say that the light-heartedness of it undermines the importance of the lessons it strives to teach. Many employees have reported that they were able to take away more from the lesson because it did not take itself too seriously, and that they have often found themselves remembering the opening video as they were on the phone at a later date.

One criticism we continue to receive is that the lesson really only teaches what those with experience in an office environment would refer to as "commonsense customer service"—that it covers a great breadth of important customer service tenets but does not go into much depth about any one of them. We explained to these employees that we view this online training lesson as a starting point for an expanded training regimen in the future that would build upon the basics that were covered here. This lesson gives newer employees a sound foundation of customer service principles that they may not have been aware of prior to joining DBM, and serves as a brief but significant refresher for more experienced employees who may not have received such training in quite.

Taken as a whole, DBM is very proud of the customer service training lesson itself that has helped train employees across State government this past fiscal year but especially of our own employees for displaying great eagerness to complete the lesson with relatively little prompting. We will be happy to continue working with current and future employees to maintain that 100% status as we incorporate any future training into our customer service curriculum.

### **FY19 PLANS**

DBM will ensure compliance with existing training requirements for all new hires in FY19 and will work to implement ongoing “refresher” customer service training courses for those veteran employees who have already completed the preliminary course. Any such “refresher” courses will need to take into account the feedback that we’ve received regarding the preliminary course and delve past superficial, “common sense” customer service advice and into a more detailed analysis and explanation of customer service best practices—why they work and how we can implement them here at DBM.

Moving forward, communications office personnel will continue send a welcome email to all new hires. In that email, we will inform them of the Governor’s Customer Service Initiative and of DBM’s customer service training requirement as part of our commitment to that Initiative. They will be given one month to complete the training at their convenience as they become accustomed to their normal duties. One week prior to the deadline, communications office personnel will follow up to remind any employees who have not yet completed the training. Two days before the deadline, the supervisors of any remaining stragglers will be notified and asked to follow up directly with those employees. We believe that these procedures will ensure 100% participation by our new hires within a reasonable amount of time from their start date.

DBM will also consider whether in-depth, in-person training should be required of any specific groups of employees. The divisions that would benefit from this the most are the divisions that most often interact with members of the public: CCU and OPSB. However, these are also the divisions that would be the most difficult to organize group training for, due to the nature of the CCU call center and OPSB’s public help line. Any consideration of in-person training for these groups would need to account for these unique challenges in order to avoid significant disruption of our day-to-day operations. DBM is willing to work with the Governor’s Office to determine the best solution if it is determined that in-person training will be required in the future.

## Customer Inquiry Response Times and Overall Time-to-Resolution

### **FY18 RESULTS**

Constituent correspondences during the 2018 Fiscal Year mostly followed the expected trends for DBM, and the communications office has worked to hone a system to ensure prompt and informative responses to all letters and emails that are forwarded to us. Unfortunately, various challenges during FY18 prevented DBM from making progress toward reducing our average overall time-to-resolution to the goal of three weeks that we stated in last year's report.

Roughly one-half (172 out of 343) of the letters and emails received by DBM personnel naturally deal with various aspects of the budget process. In our tracking database, we have separated these into categories for specific budget requests (both operating and capital) submitted by stakeholders and public officials and for general statements either requesting support or opposing funding for certain programs or projects sent in by members of the public. The specific budget requests are forwarded along to the appropriate office and personnel for consideration in the appropriate spot in the State budget, while the emails and letters from members of the general public are reviewed and responded to according to the Administration's position on the issue, if any.

This presents an inherent challenge for DBM with attempting to maintain low overall time-to-resolution for correspondences. During key times of the year—from the end of December through the end of the legislative session—outside forces constrain DBM's ability to provide timely responses to budget requests. When the new budget is being finalized, DBM cannot make public any details of the forthcoming budget, so we are forced to hold our responses to any budget requests we receive during that time until after the Governor announces the new budget. Similarly, when constituents write in about certain funding provided in the Governor's proposed budget, the fact that the legislature may cut or otherwise alter that funding often requires that we wait until the budget is enacted until we can guarantee the constituents of the status of their funding.

The second-most popular category of DBM's constituent correspondences consists of letters and emails that deal with the debt collection processes and policies of our Central Collection Unit. Due to the recent expansion of our collection portfolio, the number of these inquiries and disputes has risen, as CCU is able to track down and notify more and more State debtors of their obligation to repay the debt. Because CCU often has access to the contact information for these constituents, many of these correspondences are able to be handled directly over the phone with CCU personnel, which is of greater benefit to the debtors because they are able to quickly set up a payment plan instead of waiting for letters to be exchanged via mail.

These correspondences can also prove a challenge when it comes to turning around responses quickly to the constituents writing in. Sometimes, when we are provided with all the information we need to track a debtor's account within our system, we can give them a call back or send them an email response on that very day. Other times, however, constituents' debts with CCU may be the subject of drawn-out judicial or



administrative battles, and the long and complicated nature of the record on these debts requires a more lengthy review process in order to properly ascertain what action would be appropriate in any given situation. This, naturally, slows down the process and draws out our time-to-resolution.

In spite of these challenges, we believe the current system is the best method of handling constituent correspondences coming to us either directly or from the Governor's Office, so all our future plans for improvement will use it as the foundation upon which we will work to implement more best practices to continue to reduce our average time-to-resolution.

### **FY19 PLANS**

The move that could likely do the most to improve our average time-to-resolution metric for constituent correspondences for the new fiscal year would be to declare a set time after which the communications office would follow up with any of the necessary individuals along the way who may be causing a delay in the process. Because most of the services we receive go through three steps (drafting, internal review, and review by the Governor's Office), we believe a one-week maximum for each of these would greatly reduce the overall time it takes to respond to any particular letter or email.

Under the new system, if the communications office does not receive a draft from the appropriate division within one week, the lead on the service will send a follow-up email to the designated individual within that division asking for a draft as soon as is feasible. If the internal review is not conducted within one week from receipt of the initial draft, it will be easy for the lead on the service to speak with the individual response for reviewing it and ask that they do so as soon as is feasible. Finally, if the Governor's Office takes longer than a week to give DBM the go ahead for the final response, the lead on the service will send a follow-up email to the appropriate individual who has been tasked with reviewing that specific draft.

While there will certainly be exceptions to the rule, we believe that following the above process will drastically reduce the number of constituent correspondences that take longer than three weeks to resolve. The communications office will announce this at the next senior staff meeting and ask all division chiefs to be prepared to instruct their staff to follow it as we strive to improve upon this metric for FY19.

## Improving the Customer Experience from Multiple Perspectives

### Making Agency Services Available Online

#### **WORKDAY BENEFITS IMPLEMENTATION**

The Maryland Statewide Personnel System (SPS) is a collection of applications to streamline and modernize the state's approach to managing Human Resources, time and attendance, learning, state job search and applications for state employees across all 54 agencies. SPS is made up of three separate applications: Workday, The Hub, and JobAps.



Workday is a cloud-based HR management, benefits and time tracking system accessed using a web browser. Since Spring of 2016, 54 Agencies have been using Workday as the new way to track time and time off. The employee benefits implementation pilot program for the Department of Budget and Management and the Department of Information Technology went live in September 2017 following a brief delay arising out of a number of Workday system limitations that the State had identified as “blockers” to a successful go live and due to some configurations that were not timely completed by Workday.

The full Statewide rollout of the benefits module is scheduled to occur in January 2019. We have been using the extra time to provide additional training to agency Human Resources and Payroll staff to decrease the likelihood of errors that affect benefits and/or pay. As a result of the experience we've gained from the DBM and DoIT pilot program, we have been performing parallel testing to ensure a smooth transition to the new benefits processes.

### OCB'S ONLINE TRAINING IMPROVEMENTS

At DBM, our customers include the other state agencies. We try to make the budget request process as simple for them as possible, so they can ask for the resources they need to serve the public, and DBM can make sure every dollar is well justified.

**Cost & Funds - Request**

Requested Phase Breakdown by Cost

Fund Type	Prior	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025+	Total
Acquisition	0	0	0	0	0	0	0	0
Planning	0	0	0	0	0	0	0	0
Construction	0	0	0	0	0	0	0	0
Equipment	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Requested Funds By Source

Fund Source	Prior	Phase	2020	Phase	2021	Phase	2022	Phase	2023	Phase	2024	Phase
GO	0		0		0		0		0		0	
GF	0		0		0		0		0		0	
SF	0		0		0		0		0		0	
FF	0		0		0		0		0		0	
RB	0		0		0		0		0		0	
NB	0		0		0		0		0		0	
<b>Total</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>	

Non-Budgeted Funds Source

Source of Funds
<b>Total</b>

Chat

Shahrazad Ravi@Alc: How do I enter my request into the Cost and Funds screen?

You@Alc: Great question! I will demonstrate that for you now.

In 2018, the DBM Office of Capital Budgeting improved its program for training agencies in preparing their capital budget requests. Previously, DBM has held large, classroom-style training sessions. These were one-size-fits-all, scripted lectures with limited ability to address individual needs. They required travel for agencies located outside the Baltimore State Office Complex.

This year, DBM budget analysts provided on-line tutorials with individual agencies or small groups. Participants received instruction at their desks where they would be doing the actual budget preparation using remote screen-sharing tools. DBM analysts guided participants through the request process using their actual projects and programs. Participants could ask questions and get answers in real time.

The improved agency training is resulting in fewer errors, less wasted time and effort, and better budget information for decision makers.

## Processing Times for Customer Interactions

### **CCU'S MODERNIZATION PROJECT**

The Central Collection Unit has been undertaking a significant modernization project to replace the Department of Budget and Management's existing legacy collections software and supporting applications with a state-of-the-art, Commercial-Off-The-Shelf (COTS) Debt Collection Information System (DCIS) software application.

Accomplishments to date include the procurement of: the Fair Isaac Corporation (FICO) Debt Manager core collections software solution; Hyland OnBase Scanning and Document Management solution; Bank of America Payment Gateway for Debtor portal and payment processing via the Web and via telephone; and the Noble Systems Contact Center Solution which will include features for Interactive Voice Response (IVR), Automated Call Distribution (ACD), and implement Voice Over Internet Protocol (VoIP). Hardware has also been procured to support the required infrastructure for the DCIS which will be serviced by DoIT and housed in the State's Data Center located in the TierPoint facility in Baltimore, MD. The project team is performing the systems integration of the DCIS solution and is staffed with a combination of CCU regular employees, contractual employees, and DoIT contractors.



DBM's Central Collection Unit recently began the process of replacing the existing legacy collections software and supporting applications with a state-of-the-art, Commercial-Off-The-Shelf Debt Collection Information System software application. Accomplishments to date include software procurements to support faster payment processing via telephone and the Internet, such as Interactive Voice Response, Automated Call Distribution, and Voice Over Internet Protocol. Hardware to support the required infrastructure has also been procured and will be housed in the State's Data Center in the Baltimore TierPoint facility and serviced by DoIT.

### **DPPA'S PROCUREMENT REFORM PROJECT**

The Statewide Procurement Reform currently underway as a result of 2017 HB1021 has kept Jamie Tomaszewski and Rachel Hershey very busy serving four clients: DBM, DGS, DoIT and MDOT, as well as assisting Bob Gleason, the State's Senior Procurement Executive at DGS. Rachel is serving as the Procurement Officer on the new eProcurement System (eMaryland Marketplace). Jamie worked with the agencies and AAGs to develop the new Statewide RFP Template Version 2.0 (published in May) that streamlined the RFP document to make it easier to use and follow for both the agencies and the business community. The changes to the template were based on business community outreach and the recommendations from the Commission to Modernize State Procurement.

Additionally, Jamie has lead a team of procurement professionals from many State agencies including the ones mentioned above and the BPW, MDH, and DHS to create a Statewide Procurement Manual to provide best practices and procedures for conducting procurements in Maryland. This manual will be used to develop the procurement training program to begin after the implementation of HB1021 in October 2019.

The DBM Procurement Analysts are helping train new agency procurement officers through phone conferences and on-site visits. Mike Yeager was recently acknowledged by DJS for coming to their office in Baltimore to give an overview of the procurement process from creating an IFB or RFP to submitting award recommendations to DBM for BPW approval. Pam Malech met with DHCD in Crownsville to help with a re-procurement for services that required training for DHCD staff on the new MBE forms.

The DBM Procurement Analysts are serving as Procurement Officers for agencies that do not have staff to conduct major procurements for their agencies. Andrea Lockett is working on Inmate Pharmacy Services for DPSCS. Chris Hautala served as the Procurement Officer for the MDSP Aviation Command's Helicopter Maintenance Master Contract and is currently working with UEF on its procurement for a Third Party Administrator.

Finally, in May, Mary Naramore, Joan Peacock and Jamie Tomaszewski provided a half-day training class on the Inter-Agency Agreements (IAAs) Approval Process and Reporting Requirements, as well as reviewing the plan for participation by Historically Black Colleges and Universities, to all State Agencies and Maryland Higher Education Institutions. Mary and Joan regularly meet with MDH staff for reviewing and approving their IAAs. All three will continue to be available to the agencies and institutions whenever they have questions about these agreements.

### **OBA'S NEW BUDGET SYSTEM**

BARS is the acronym for the Budget and Analysis Reporting System. The Board of Public Works approved the contract in September 2016 and the implementation team has been hard at work since then. The implementation vendor, Performa, is the Australian company that provided new budget systems for Virginia and Tennessee.

The Office of Budget Analysis within DBM is working with Performa and a team of DoIT contractors to implement the new, web-based system. All agencies have been invited to meetings, webinars, and working sessions related to BARS. There is usually more than 100 agency staff attending each of the monthly stakeholder webinars. Some agency staff listening to the webinars has commented on the lilting “southern” accent of Brendan Hayes (from Australia) who is the main presenter. Brendan is a pleasure to work with and is always interested in differences between Maryland and Tennessee budgeting practices. (He implemented the Tennessee system last year.) Smaller meetings with agency staff have been held across the State on a variety of topics. Meeting topics have included: (1) personnel inventory and reconciliation, (2) agency data exchange, (3) operational reporting. Meetings with agency staff have been occurring at least twice a month since January, and often more frequently.

By the start of FY18, agency staff was able to access the new system via the web while sitting at their own desks! Agency staff first used the system to identify differences between personnel data in BARS (from the FY 2018 budget allowance data) and Workday. Of course we expect most of the Workday data to be more current, since the data in BARS was submitted by the agencies more than eight months ago. Agency staff is able to over-write the BARS data with the Workday data as appropriate. If Workday data needs to be edited, the agencies will do those edits in Workday (not in BARS). BARS will pick up the edits made in Workday in the regular daily download from Workday into BARS.

The agencies are also able to use BARS to view FMIS expenditure data. There are reports in the system that will allow agency staff to compare the FMIS data with the budget in BARS. Eventually BARS will offer reports that will show variances between agency expenditure data and FMIS data. The intention is that agencies will be able to correct FMIS data from within the BARS system via a nightly upload to FMIS.

For the formation of the FY 2019 budget, agencies downloaded an Excel template from BARS that contained the FY 2018 appropriation. They updated the Excel template with the FY 2019 request and submitted the Excel template to DBM as the FY 2019 budget request. The template will be uploaded into BARS by OBA and the OBA analysts will use BARS for analysis and final publication of the FY 2019 Budget Allowance.

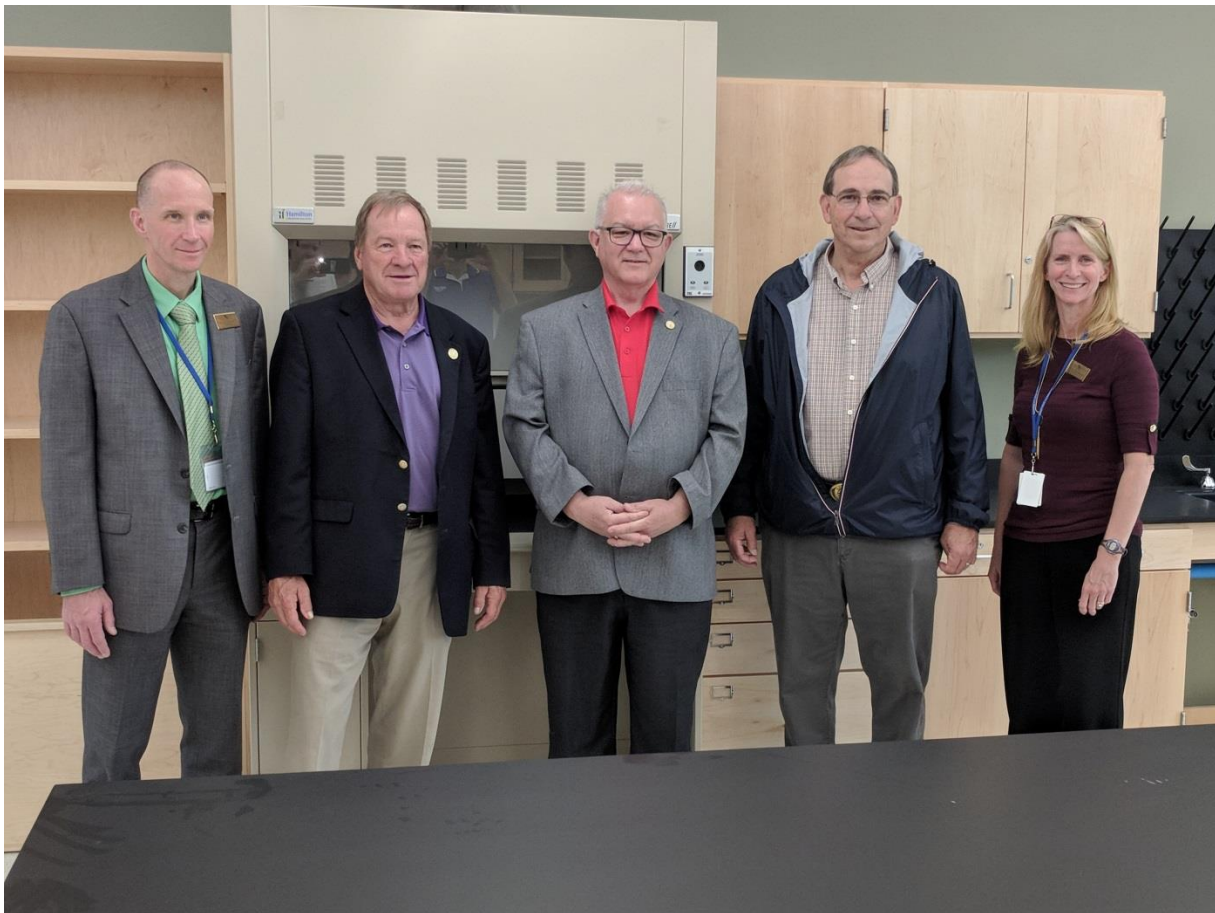
Within the past year, there are other pieces of BARS that have been unveiled. One of the most exciting pieces is functionality that could replace the current paper-based budget amendment system. The details of the workflow -- within agencies, to DBM, to Department of Legislative Services (when necessary), back to DBM, to the Governor's Office, and then to General Accounting Division -- will take time to document and implement.

The Performance Measurement module and the Executive Dashboard module were tested and implemented in the Spring of 2018. Also during the Spring, agency staff began to undergo their own training on the full functionality of BARS. Agencies will use BARS to create and submit the FY 2020 budget request.

Connecting Directly with our Customers**SECRETARY BRINKLEY'S ROAD TRIPS**

Following the example set by Governor Hogan's regional Cabinet meetings and building on last year's successful efforts, the DBM communications office once again coordinated several "road trips" to localities across the State for DBM senior staff to meet with elected officials and stakeholders, tour capital projects that have received State funding in the past or are receiving State funding in the FY 2019 budget, and otherwise get the word out about the new State budget to the most important customers of all: the people of Maryland.

In addition to the four Cabinet meetings that took place in Baltimore City, Baltimore County, Howard County, and Calvert County in FY18, Secretary Brinkley has also traveled to Allegany, Dorchester, Frederick, Garrett, Harford, St. Mary's, Talbot, Washington, and Wicomico Counties over the past year.



Wherever he has gone, Secretary Brinkley has invited members of the respective legislative delegations, along with local government officials to join him on the tours, to listen to some important remarks about the State's current fiscal situation, and to share with him some details about the importance of the projects to their constituents.





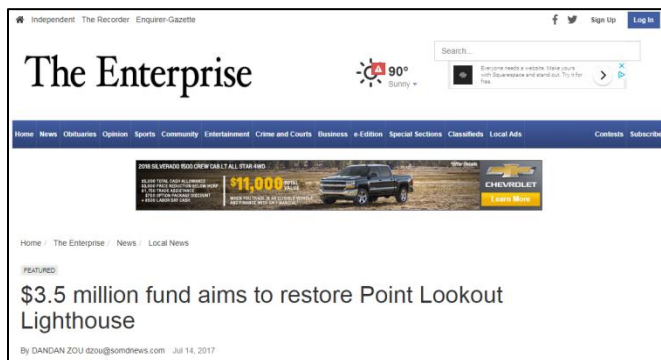
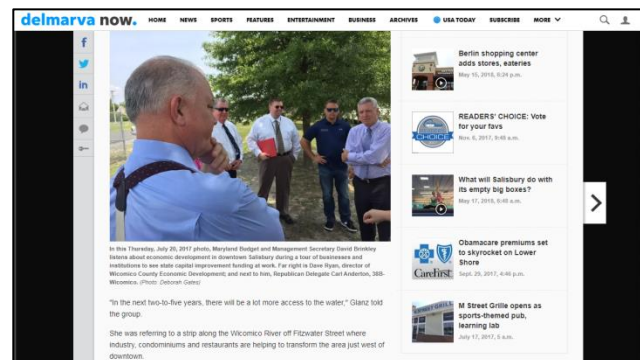
On these visits, Secretary Brinkley has also striven to meet with local business owners and community leaders in order to listen to what they have been experiencing over the past four years, to explain where Maryland stands from a fiscal perspective, and to respond to any questions or concerns they may have about the current administration's efforts to make Maryland a more attractive play to live, work, and do business.

Finally, while the visits have not drawn the same level of attention as when Governor Hogan visits places across the State, we have been able to garner a modest amount of local press coverage on these visits. Secretary Brinkley has been able to use this coverage to express the importance of these regions to maintain a successful Maryland economy, a strong Maryland culture, and a healthy Maryland environment.



WCBC Radio in Cumberland prepared a [segment](#) about Secretary Brinkley's visit to Garrett and Allegany Counties in May 2018.

The *Delmarva Daily Times* [reported](#) on Secretary Brinkley's visit to the Mid-Shore Counties in July 2017.



The *Enterprise* [reported](#) on Secretary Brinkley's visit to Calvert County in July 2017.

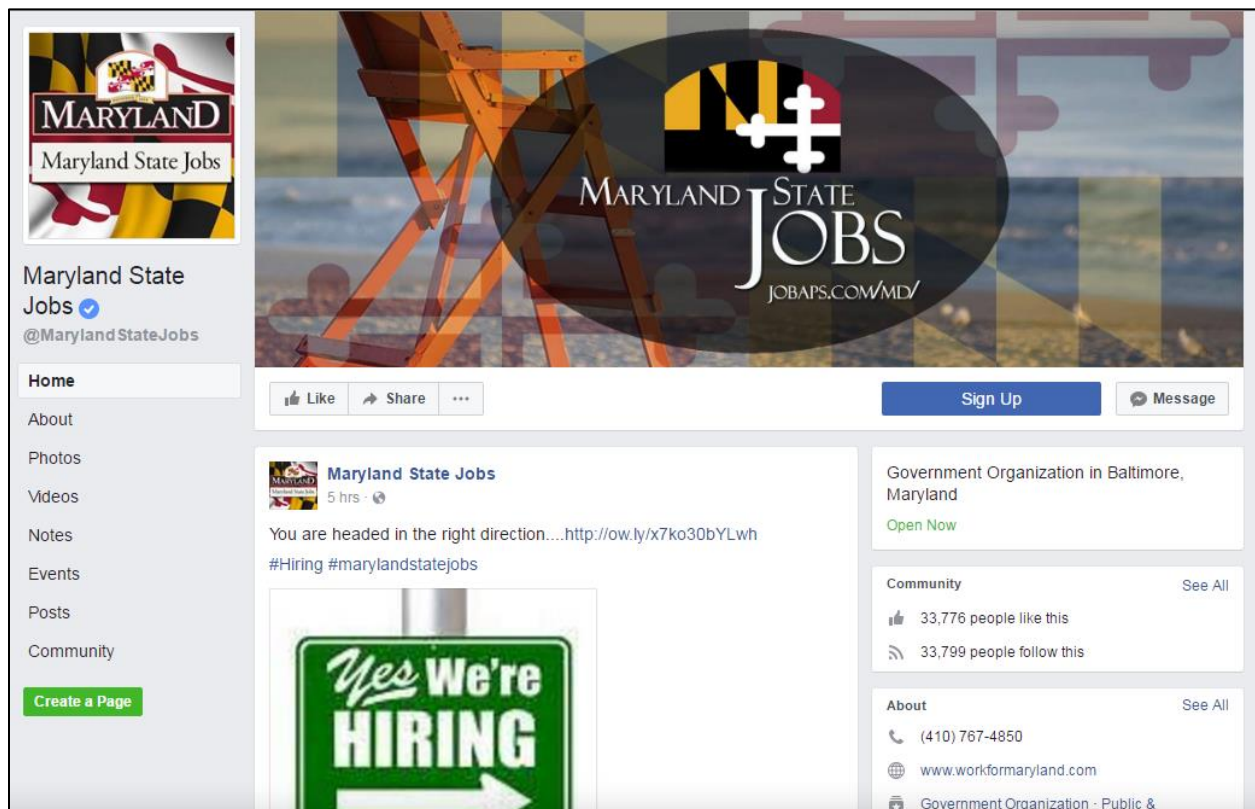
The Hagerstown Herald Mail [reported](#) on Secretary Brinkley's visit to Washington County in September 2017.



## Social Media Usage to Improve the Customer Experience

### **MARYLAND STATE JOBS**

DBM operates one major State social media profile across three platforms concerning the availability of and recruitment for positions of all kinds within all State government (not only at DBM). According to our most recent social media report, the reach of this profile is as follows:



Facebook: 35,825 followers (as of 07/01/2018)  
 33,278 followers (on 07/01/2017)  
 = 8% increase in followers during FY18

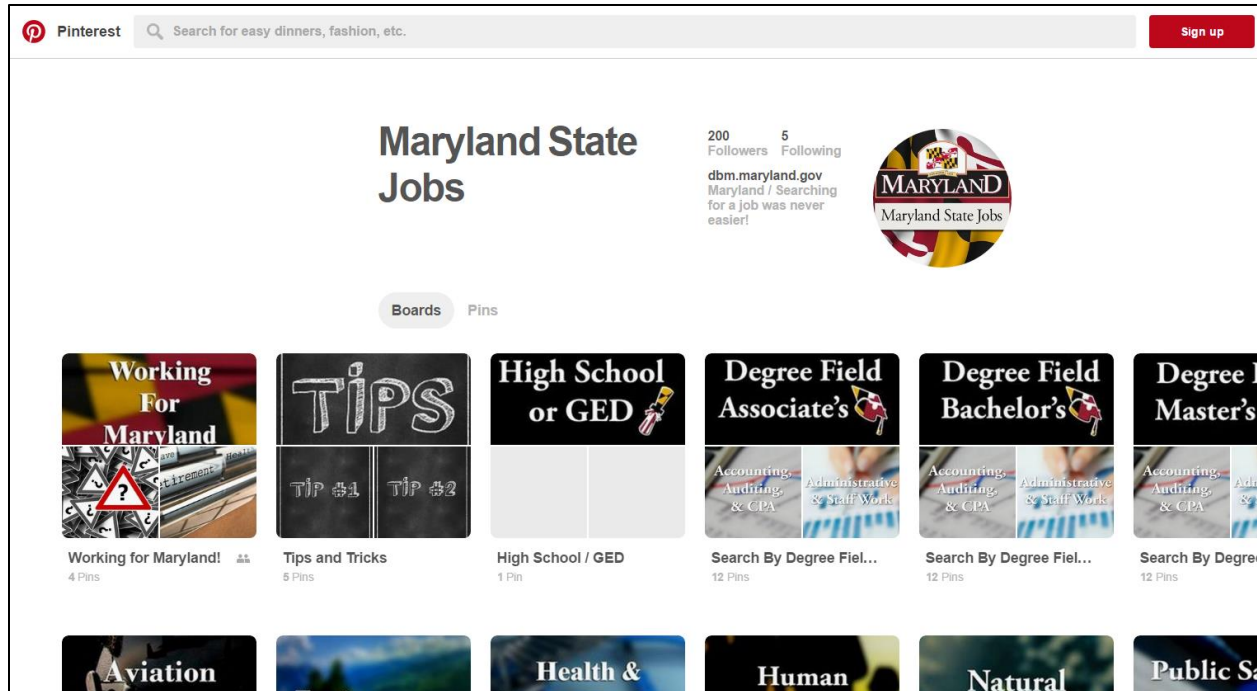
Facebook is visually oriented content with text and link information. 31% of our Facebook audience (fans) is 25-35 year olds, which is our primary social media target audience. Additionally, 30% of our audience is 35 to 44 year olds, which is our secondary target audience.





Twitter:        3,745 followers (as of 07/01/2018)  
                      3,427 followers (on 07/01/2017)  
                      = 9% increase in followers during FY18

Twitter is more oriented to brief communications, whereas Facebook allows more detail in our posts. We offer our Maryland State Jobs Twitter account as a customer service, and courtesy to Maryland citizens who may not be Facebook members or might want brief ongoing updates.



Pinterest is almost entirely visual content. We created a Maryland State Jobs Pinterest account in 2016 as an experiment to make different state jobs available to people who are more visually oriented. By seeing employees performing job tasks in the field, a user can click through and find state jobs without having to know some of the state's obscure classification titles. Our highest viewership was 790 in June of 2018, an increase of 243% over 230 in June of 2017.

Our "Latest Job Postings" page on the DBM website offers customers a user friendly and convenient way to follow the latest state government job openings. We link to the web page daily through both our Facebook account and our Twitter account. For comparison, the Latest Job Postings page was viewed 20,487 times in July of 2017 and 16,329 times in July of 2018. We believe the lower number is due to Facebook process changes brought on as a result of their high profile data breach last year. Some of those changes affect how FB analytics are calculated. The change likely reduced overall stat numbers for FB page accounts.

Since Instagram has now become a "go to" app for young users, we are currently researching Instagram as an additional recruitment outreach tool for available positions throughout State government.

**BACK COVER**