



## Corporate Policy

<b>Policy Name:</b> <b>Customer Service Standards</b>	<b>Policy Number:</b> <b>CP-2025-02</b>
<b>Date Adopted:</b> <b>April 30, 2025</b>	<b>Division/Department:</b> <b>Customer Experience Office</b>
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### 1. Purpose

The Customer Service Standards Policy (Policy) specifies standards and responsibilities for staff when communicating with or responding to customer inquiries or requests for service, including, but not limited to, in-person contact, telephone, web-based (including social media), written, or e-mail correspondence.

The Policy also outlines expectations for customer behaviour to foster a positive environment when interacting with representatives of the Town for service.

### 2. Policy Statement

The Town of Midland is committed to providing exceptional, equitable and accessible customer service in an efficient and professional manner and to deliver municipal services in a safe and healthy environment.

### 3. Definitions

For the purposes of this Policy:

- a) “Case” is an enquiry, complaint or request for service entered in the Town’s customer service portal.
- b) “Case Number” is a unique, system-generated identification number assigned automatically to a case in the Town’s customer service portal, as defined in Section 3 a) above.
- c) “Communication” is any method that a customer interacts with an employee which includes in-person, phone, email, fax or regular mail, or through the Town’s website or social media.
- d) “Council Information Package” (CIP) is correspondence received by the Town and provided to Council in the form of a list that is posted to the Town’s website.
- e) “Customer” includes ratepayers, taxpayers, interested parties, suppliers and members of the public on Town property, Council, Board and Committee members, and co-workers.
- f) “Customer service portal” is the Town’s web-based system to create and track requests for a municipal service.
- g) “Excessive requests” is any combination of multiple communications with

employees in the form of in-person, telephone, email, mail or hand delivered correspondence dealing with the same or similar issue which was previously resolved by the department.

- h) “Frivolous” is any claim that is baseless or without purpose or value.
- i) “Illegal behaviour” is an action or conduct that violates provincial, federal or municipal statutes or by-laws.
- j) “In-person” is when a customer attends the Municipal Office or NSSRC and engages “face-to-face” with an employee for the purpose of seeking a municipal service.
- k) “In-the-field” includes any employee working away from their regular place of work at a Town facility, Town event, or those approached in a public area while wearing a Town uniform, ID badge or other Town insignia.
- l) “Out of office message” is an automatic email reply to senders informing the intended recipient is away from the office and is unlikely to have access to their email.
- m) “Regular business hours” are the hours during which the business of the Town is normally conducted at the Municipal Office.
- n) “Written correspondence” is any communication in hard-copy format received via regular mail, courier or hand-delivery.
- o) “Unacceptable behaviour” is when a person exhibits threatening, aggressive, abusive or violent behaviour.
- p) “Vexatious” is any unjustified claim that is intended to cause annoyance or frustration.

#### **4. Customer Service Standards**

This section outlines standards of response or service that customers should expect from Town employees through these channels of communication:

- In-Person
- Telephone
- Email
- Written Correspondence
- Customer Service Portal
- In the Field

##### **4.1 In-Person – Municipal Office and Recreation Centre**

The Town offers in-person services at the customer service windows of the municipal office and the recreation centre. These hours are posted on the website and on-site. When in-person service is not available, the community shall be informed via the Town’s website in the News and Notices section and on social media. Employees at each location will:

- a) Acknowledge customer politely and professionally in the order in which they arrive.
- b) Ensure that no customer waits longer than five minutes to be acknowledged.
- c) Provide appropriate service, direction or information in a timely and courteous manner.
  - i. Employees have a range of duties, meetings and other work-related obligations which may preclude them from being available to address unscheduled walk-in service requests.
  - ii. Employees will make every attempt to assist customers without an appointment, however it is advisable for customers to book an appointment or contact the municipal office or recreation centre to confirm employee availability.
- d) If required, a case may be created in the Town's customer service portal for further investigation.

## **4.2 Telephone**

### **4.2.1 Incoming Calls**

- a) Answer call in a timely, polite and professional manner.
- b) Employees will attempt to answer the enquiry rather than transferring the caller (customer) to other employees, however,
  - i. Prior to transferring a call to another employee, employees will attempt to reach other employee if available and provide sufficient detail to that employee, or,
  - ii. If the employee is not available, advise caller to leave a message for the employee.
  - iii. For any municipal service request that should be logged in the customer service portal, create a case for tracking or further investigation.

### **4.2.2 Voicemail Greeting**

- a) Set up a recorded voicemail greeting to provide accurate and current information for the caller.
- a) Provide updated voicemail greeting for a scheduled absence of two (2) or more business days with employee working status, including expected return date and response time. Statutory holidays do not require an out-of-office notification except where there is a planned shut-down during regular business hours (e.g., planned office closure between December 24 and January 2).
- b) Where practical, provide alternate employee contact and extension number should the customer require immediate assistance.

### **4.2.3 Returning Voicemail Messages**

- a) Respond to voicemail messages within two (2) business days of receipt.
- b) Provide anticipated response time if more time or information is required to address the enquiry.

**Note:** Voicemail messages received after regular business hours are considered received on the following regular business day.

## **4.3 Email**

### **4.3.1 Incoming Email**

- a) Acknowledge email within two (2) business days of receipt advise anticipated response time if more time or information is required to address the enquiry. Response method can be at the discretion of the employee (e.g., by phone, email, or written communication).

**Exception:** Email messages addressed to the Mayor and Council are forwarded to the Clerk's office for circulation to Council, inclusion on an upcoming CIP, or a future Council agenda.

**Note:** Email messages received after regular business hours are considered received on the following regular business day.

### **4.3.2 Email Out-of-Office Notification**

- b) Set up out-of-office notification for a scheduled absence of two (2) or more business days including working status, including expected return date and response time. Statutory holidays do not require an out-of-office notification except where there is an extended municipal shut-down during regular business hours (e.g., planned office closure between December 24 and January 2).
- c) Provide an alternate employee contact and email address should the customer require immediate assistance.

## **4.4 Written Correspondence**

- a) Acknowledge correspondence requiring a response or action within five (5) business days of receipt, through a method at the discretion of the employee (phone, email, written communication) and provide anticipated response time if more time or information is required to address the correspondence.

**Exception:** Correspondence marked as "confidential" remains unopened and stamped "Received" with a date stamp and directed to the appropriate employee or department as noted on the envelope.

**Note:** Written correspondence that has been received primarily for information purposes and does not require a response may be filed as per the Town's records management program or may be forwarded to the Clerk's office for inclusion on an upcoming CIP.

## **4.5 Customer Service Portal**

- a) Acknowledge case within two (2) business days of receipt and provide an anticipated response time if more time or information is required to address the enquiry. Response method can be at the discretion of the employee (phone, email, or written communication).

**Note:** Cases received through the Town's customer service portal after regular business hours are considered received on the next business day.

#### **4.6 In-the-Field**

- a) Field staff will attempt to answer questions and concerns to the best of their ability.
- b) Field staff should refer the customer to contact the municipal office to speak with a customer service representative or submit an enquiry through the online customer service portal for requests that cannot be resolved in the field.

### **5. Social Media Comments or Requests**

- a) The process for handling comments on social media is outlined in the Town's Social Media Policy.
- b) Service requests via private direct message (DM) to the Town's social media accounts may result in delayed response, including after business hours. For immediate concerns citizens should refer to the Town's Contact Us page on the Town's website as the official channel to request service.

### **6. Information Privacy and Anonymous Requests**

The Town of Midland is committed to protecting the privacy of personal information of customers and adheres to requirements of the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA), the Town's Records Management Policy and other privacy laws, therefore:

- a) Requests for service expecting investigation or follow up response from departments must be submitted with name, address, location of concern, and a contact number or email address.
- b) Anonymous requests for service or complaints regarding potential infractions of municipal by-laws or policies will not be addressed, except:
  - i. In circumstances where the situation has the potential to create an immediate health and safety issue or other serious effect (e.g., stop sign down, fallen or damaged tree).
  - ii. When a general enquiry or request for information regarding a municipal service is received (e.g., how to find the Council agenda).
  - iii. When notification of infrastructure malfunction is received (e.g., streetlights or traffic lights out), or other road maintenance issues such as potholes.
  - iv. When a scheduled service was not provided on time such as snow plowing, grass cutting, trail maintenance, etc.

- c) If a concerned citizen is not satisfied that an anonymous request or complaints regarding potential infractions of municipal by-laws or policies will not be investigated, a complaint can be filed under the Town's Municipal Complaint Policy.

## **7. Frivolous, Vexatious, Unreasonable or Repeated Requests**

Frivolous, vexatious, unreasonable or repeated requests, or those intended to annoy, harass or disrupt municipal operations, can consume a disparate amount of time and resources, interfering with the Town's ability to provide service efficiently and effectively. Examples include submitting repeated requests already deemed to be resolved, excessive requests for documents or information, or submitting numerous requests about the same issue.

- a) For any such requests, employees may report them to their department manager for review. The purpose of the review would be to determine the likelihood of resolving the customer's request.
- b) If the request cannot be resolved by the municipality, the department manager will communicate in writing (mail or email) to the customer with a copy to their member of senior leadership team outlining:
  - i. A resolution to the issue.
  - ii. The reason why an issue cannot be resolved.
  - iii. If required, an explanation why similar or repeated requests may no longer be reviewed by the Town.
- c) If a concerned citizen is not satisfied with the resolution a complaint can be filed under the Town's Municipal Complaints Policy.

## **8. Customer Conduct – Unacceptable Behaviour**

All engagement by and with customers adheres to the Town's Respectful Workplace Policy. No employee is required, or should feel obligated to, deal with any customer who is exhibiting threatening, aggressive, abusive or violent behaviour.

Any of the following steps may be taken by the employee or Town:

- a) If an incident presents an immediate threat, an employee will call 911.
- b) The employee may provide a verbal warning to the customer that the behaviour is unacceptable and could result in a refusal to provide service.
- c) If behaviour persists, the employee may refuse to serve the customer, ask the customer to leave the building, end a phone call, or cease to respond to emails.
- d) The employee may refer the customer to a department manager for investigation to determine a further course of action, including potential service restrictions.
- e) Any illegal behaviour will be communicated to the proper authorities in addition to other legal steps the Town may take.

## **9. Service Restrictions**

In cases where customer behaviour is causing staff to consider limits on service inquiries or service delivery to a member of the public, the department manager should follow the service modification procedure noted below. Service restrictions could include ceasing to respond to complaints, restrictions on complaints accepted, or revoking access to services such as Town buildings or transit services.

- a) The department manager reviews the unacceptable customer behaviour identified by staff.
- b) The department manager may consult with the manager of customer service to determine if a restricted customer service path is an available option.
- c) The department manager provides an outline of the proposed service restrictions including suggested timelines based on the nature of the behaviour, to their member of senior leadership team for approval.
- d) The approved service restrictions, and the process for appeal, is provided to the customer in writing (mail or email) with a copy to the CAO.

## **10. Appeal of Service Restrictions**

An individual may appeal a decision by the municipality to impose service restrictions, as outlined in section 9, in writing to the Customer Experience department. The process that should be followed is:

- a) The Manager of the Customer Experience distributes the appeal to the related department manager and member of senior leadership team with a copy to the CAO.
- b) The department manager or their member of senior leadership team reviews the appeal and restrictions imposed within 10 business days from the date the appeal was received by the Town.
- c) The department manager, member of senior leadership team or the CAO may confirm, cancel or amend the restrictions, and respond to the customer in writing. This decision is final.

## **11. Accessible Customer Service**

The Town makes services accessible for customers as outlined in the Town's Accessible Customer Service Policy. Accessible formats or other support required to meet the customer's needs will be provided.

## Appendix A

### Customer Service Standards Summary

Communication Method	Commitment
In Person	Immediate assistance where possible, and no longer than five (5) minutes' wait-time for customer to be acknowledged.
Telephone Calls (incoming)	Live answer where possible, transfer to another employee only if required or enter a case into the customer service portal.
Voicemail Greeting (outbound)	Activated with employee's accurate work status, to be updated when the employee is away from the office for a scheduled absence of two (2) or more business days with details of return date and alternate Town contact.
Voice Mail Messages	Initial response within two (2) business days with resolution or expected resolution timing. Further follow-up may be required if the resolution takes longer than anticipated.
Email (inbound)	Initial response within two (2) business days with resolution or expected resolution timing. Further follow-up may be required if the resolution takes longer than anticipated.
E-Mail Out of Office Message	Activated during absence of two (2) or more business days with details of return date and alternate Town contact.
Written Correspondence	Response within five (5) business days with anticipated response time on matters requiring follow-up.
Customer Service Portal	Initial response within two (2) business days, with resolution or expected resolution timing. Further follow-up may be required if the resolution takes longer than anticipated.
Social Media	Response to comments on social media are in keeping with the Town's Social Media Policy.