

Progressing Towards Excellence
The Challenge for European Public Administrations in Difficult Times

Improved Quality of Service Delivery

1. Identification

Reference/ Session: S7.3.

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|  | <p>Focus:</p> <p>Results orientation</p> |

2 Quality Improvement issues

Quality Management System was implemented in The Tax Office in 2005. The organization defined the processes, established and implemented procedures, instructions and information cards. The Quality Manual became a compendium of information about the system. According to the implemented Quality Policy the top as well as the middle management is involved in quality issues. Meeting the customer requirements became a goal in the whole organization. This principle has been applied in the **certificates' service procedures**.

The first experiences with the CAF model began at the end of 2008. During the year 2009 the CAF Project Group was meeting with the management, Quality Officer and a staff to realise a self-assessment, analyse the processes, review the areas of activity, make an improvement cycle and finally establish four good practices. "Improved Quality of Service Delivery" was one of the good practices and concerned the certificates' issue. The management of the office and Quality Officer established the main and specific tasks to obtain the most effective and efficient services.

Main objectives:

- 1) issuance of certificates on the spot
- 2) fast service
- 3) high-quality service
- 4) maximal reduction of clerical errors
- 5) high level of customer satisfaction

Specific objectives:

- 1) detailed characteristics of our current and potential customer groups
- 2) understanding the customers' needs and preferences
- 3) precise strategy and procedures focused on fast and effective service
- 4) customer-orientated staff (polite, friendly to customers, understanding their needs)
- 5) systematic staff training
- 6) adjusting working hours to the need of the customer
- 7) signing an official Agreement with District Social Aid Institutions (DSI)
- 8) regular monitoring of customer satisfaction

Self-assessment procedure (performed in accordance to CAF method) carried out in 2009 allowed to establish a good practice concerned with the certificates' issue. It also discovered more potential areas to improve. All activities were implemented to achieve optimal effects and bring the organization closer to TQM maturity stage in the area of Result Orientation.

3. Case background

The Tax Office in Amos is a part of the public sector and provides internal revenue services. It is one of 401 tax offices in the country that deal with the registration of taxpayers, tax assessment, audit and collection, enforcement of tax liabilities and performance of investigation against fiscal offences.

Apart from the taxation area, one of the most important activities of the office is the certificates' service. The tax office issues the certificates which confirm income, employment or self-employment, a form of business activity

and other information. The long queues in the office, a large volume of certificates issued per year (2007: 54 667, 2008: 51 643, 2009: 49 237) and the customers' opinions in the conducted surveys convinced the management to the need to introduce certain improvements. The office management, Quality Officer and the staff began to plan and implement the improvement solutions in the years 2007-2008.

One of the vital objectives for the organization was to realize customer's necessity: "Receiving a certificate during one, short visit in the office" (regulatory background: the certificate is being issued on a specific request and has to be issued within 7 days from the day of applying). Approximately 77-82 % of all certificates are issued for the customers who need them as a confirmation of their income for the two groups of organizations: District Social Aid Institutions, or schools and universities. In order to plan the changes, it was essential to bear in mind that about 70-75% of certificates are issued in a short period of the year, namely in the **four** months of August, September, October and November (law obligations). This means that a huge number of customers visit the tax office in those four months.

The needed improvements were implemented: customer service hall modernization, training for the front office staff, change of the working hours, improvement of information and communication with customers. Those activities brought positive results but the average time spent in a queue by a customer was still too long. That's why an official Agreement (voluntary cooperation) with the 15 District Social Aid Institutions (DSI) was signed in 2008. Customers can submit the application forms on the area of their district without having to visit the tax office. The DSI are sending the forms to the tax office then the certificates are issued at the back office and sent to the DSI immediately. That solution has decreased the number of customers in the office and thus improved the quality of service.

Regular surveys are performed in the office to monitor the level of customer satisfaction. They show that the clients are very satisfied with all of the organizational changes and the agreement signed with DSI.

4. The Actors

The certificates' delivery procedure has been improved with the organization's own resources and the involvement of the local 15 District Social Aid Institutions (DSI). Subjects involved and responsible: management, staff, Quality Officer (person responsible for the project and the pilot of the project), CAF Coordinator, representatives from the DSI.

5. The Work process / the Approach

According to the Quality Management System and the CAF model implemented in the office, a concept of Deming circle was implemented -**PLAN** (description of the current situation, definition and the needs exploration), **DO** (realization of the improvements: Customer Hall Service changes, training of the staff, communication), **CHECK AND ACT** (observations of the results ->insufficient changes-> signing an agreement with DSI, other changes). Both the management and staff were heavily involved in the performance of the changes.

In the effect of implementation of the new solutions, the following key tasks were performed:

- Customer Service Hall modernization :
 - 1/ chairs and tables for the customers - to sit and fill in the documents,

- 2/ more front office stands for customers
- 3/ clear, simple description of the stands
- 4/ front office staff with excellent communication skills
- 5/ technological equipment of the stand (workstation, printer)
- 6/ box for the documents (for those who do not want to wait)
- 7/ shelves for the claim forms, questionnaires
- 8/ self-service information kiosk
- Convenient software as a tool :
 - 1/ effective network application to compute the tax-payer's income
- Meetings and trainings for the staff :
 - 1/ meetings with the management, information about plans and solutions
 - 2/ internal trainings for the front office staff
- Working hours (07:00-18:00 – on Mondays, 07:00-15:00 other days)
- Improving information-flow and communication with customers :
 - 1/ simple format of a claim form for a certificate
 - 2/ accessibility of a claim form: paper form – customer service hall, DSI, website
 - 3/ Information Card: "Certificates' Issue" (paper form: customer hall, website)
 - 4/ Information on the website: www.uszamosc.pl
 - 5/ Advertisements in the local papers about the certificate service
 - 6/ Interviews on the local TV channels
- Customer satisfaction surveys :
 - 1/ regular, planned and direct surveys
- Signing an Official Agreement with the 15 DSI

6. The Measure of Success

Careful attention is given to customer feedback- regular, planned surveys are conducted and the questionnaires are analyzed to provide the best service and to check customer satisfaction. The high customer satisfaction is a real goal.

Benefits for customers:

- ✚ receiving a certificate during one, short visit in the office
- ✚ reduction of queue (up to 15-20 minutes)
- ✚ Time and money saved to a great number of customers contacting by DSI (In 2009 the tax office issued 29376 certificates for DSI, DSI sent 8124 filled forms. This number of potential customers (27,5 %) was released from the need to visit the tax office to obtain a certificate)
- ✚ simple application forms
- ✚ easy access to forms (office, the World Wide Website, social institutions)
- ✚ user-friendly Customer Service Hall
- ✚ high-quality customer service

Benefits for the office:

- ✚ high level of customer satisfaction (showed in the results of the conducted surveys)
- ✚ office is perceived as customer-friendly
- ✚ lower number of customers in the Customer Service Hall – better work conditions

7. Lessons learned

- ✚ Voluntary cooperation between local and government institutions plays a huge role in the activities towards customer delivery and satisfaction.
- ✚ The implemented good practice highlighted the importance of the following factors: positive attitude and perceiving the customer needs, creation of the new relations among stakeholders from various communities.
- ✚ The implementation of the CAF model helped to expose the good practice, to facilitate an effective self-assessment, point out the areas to review and improve, and motivate the staff (work as a team, involvement in a process of making changes, innovations, benchmarking)

8. Project Innovation Content and Adaptability

- ⇒ Involvement of local authorities in an activity focused on citizens
- ⇒ Voluntary cooperation of the Tax Office and District Social Aid Institutions leads to an increase of trust in the public institutions
- ⇒ This project as a good practice is adapted and implemented in other fiscal institutions on the territory of Poland