TEXAS BOND REVIEW BOARD

Governor Greg Abbott, Chairman

Lt. Governor Dan Patrick

Speaker Dade Phelan

Comptroller Glenn Hegar

REPORT ON CUSTOMER SERVICE

June 1, 2024

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 1st 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. Customers from all three of the BRB's program areas were asked to complete the online survey that was 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 (PAB). The agency has a wide variety of customers, from state and local issuers and municipal securities professionals to the general public, including concerned citizens, academic professionals, and students, 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 most debt issues prior to being sold in the capital markets, 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 issuance, debt outstanding, 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 the general public to understand the indebtedness of their area and other areas around the state and 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 state's PAB program and ministerial functions for certain other federal tax-exempt bond programs.

Information Gathering Methods

The BRB has had an online customer service survey available on the agency's website since 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.

On March 12, 2024, emails were sent out to 531 customers of the BRB requesting that they complete the survey online. Responses were received from 48 recipients for a response rate of 9.0%. The last response was received on April 14, 2024.

The survey included queries on service areas, facilities, staff, communications, the agency's website, complaint handling processes, timeliness, reports including printed information, and overall satisfaction. 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 2022. 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, bond counsel firms, 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 more than $5 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.
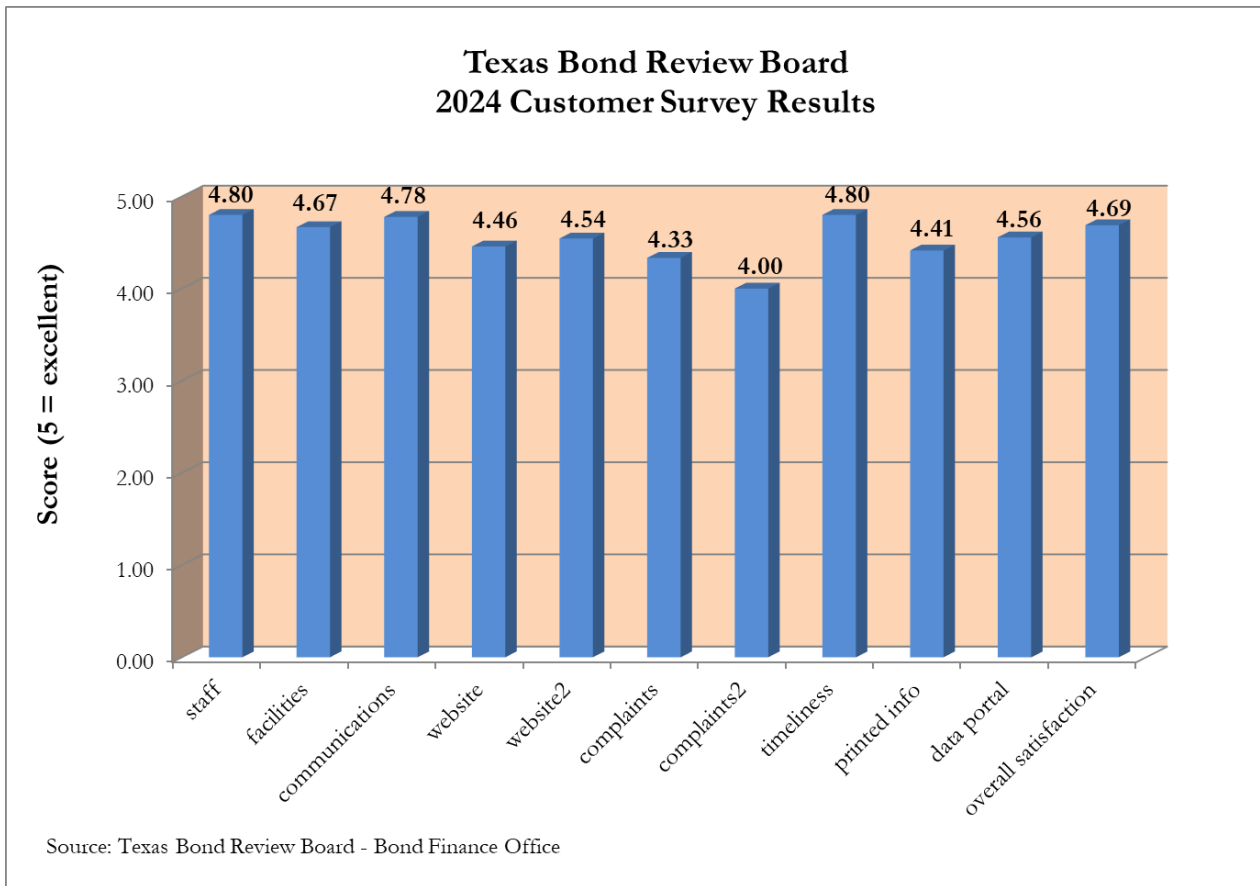
Customer Satisfaction Findings

The agency sent emails to 531 recipients requesting completion of the online survey and received 48 responses. Five was the highest rating available in a customer-service quality element, while one was the lowest rating possible, BRB staff chose a rating of three as the minimal acceptable level of customer satisfaction.

The results indicate that the highest scoring customer-service quality elements were the staff, facilities, data portal, communications, timeliness, and overall satisfaction in providing requested information. The sample size for ease of filing service complaints (shown as "complaints" in the chart) was small with 94.0% 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 96.0% of the respondents selecting "does not apply". No complaints were filed with the BRB during fiscal years 2022, 2023 and 2024. BRB staff works immediately to address any questions regarding agency operations and data available on the agency website.

The agency's website, including overall look and feel and organization of information, was one area of improvement noted several times in the past by BRB customers. The BRB launched a new website in May 2023. BRB staff recently received one comment on the agency website regarding the challenge faced with downloading refreshed data sets. The user is sometimes required to clear their browser history, and this has proven to be an obstacle for some users. Staff worked with the agency's web developer from Dynamic Computing Services (DCS) Corporation to fix this problem so the ongoing use of the BRB website is more seamless.

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.

Texas Bond Review Board
2024 Customer Survey Results

Category	Score
staff	4.80
facilities	4.67
communications	4.78
website	4.46
website2	4.54
complaints	4.33
complaints2	4.00
timeliness	4.80
printed info	4.41
data portal	4.56
overall satisfaction	4.69

Score (5 = excellent)

Source: Texas Bond Review Board - Bond Finance Office

The BRB strives to be responsive to Texas taxpayers and citizens. All reports (searchable databases and agency publications) on state and local government debt are presented on the agency's website and the Texas Open Data Portal. Visitors to the BRB website can search databases and access the Data Portal to download spreadsheets that contain debt data,

detailed cost of issuance data, debt ratios, bond election information, and population data by government type at fiscal year-end. The agency website is accessible to all users and complies with the Texas Administrative Code Section 213 - Electronic and Information Resources Accessibility Standards. A total of 7,025 unique users were identified as using the BRB website from May 2023 to May 2024. BRB state and local debt data has been previously supplied to the Comptroller's office and the Legislative Budget Board for publication on their debt website pages.

The BRB was appropriated funds for the fiscal year 2020-21 biennium to upgrade its website. With this appropriation, the BRB created a new data center website that went live in December 2020. This upgrade further increased transparency for Texas state and local debt information and consolidate the reporting of this information into one centralized location on the agency's website, allowing the user to search for debt data via a dossier-style display. The data center website allows the user to view comparative graphs and charts integrating fees, debt issuance, and debt outstanding information onto one page helping the user better understand the overall debt picture of each state and local debt issuer.

In May 2023, the agency launched a new website and began the use of cloud services to manage its data and website hosting using WP Engine and Amazon Web Services. This provides the agency with additional flexibility in managing its IT operations and precludes the need to maintain the agency's web and mail servers in-house. It also eliminates service interruptions due to maintenance or agency power outages.

The BRB was appropriated funds for the fiscal year 2024-25 biennium to build a new online data entry portal for data collection that will add efficiency and improve the collection and reporting of state and local government debt information by eliminating much of the manual data entry processing of BRB staff. These online forms will allow BRB staff to review the information provided and transmit the information directly into the agency's SQL debt database. Streamlining the collection of this information will add efficiency and save Board staff the time it takes to manually input the information. This will allow Board staff to respond more efficiently to increasingly detailed questions from the public, state leadership, and the Legislature regarding transparency for state debt issuance.

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	2	5	38	3

Facilities – Is the agency's office accessible, clean, and adequately equipped for your needs?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	2	0	10	36

Communications – Is communicating with the agency 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	2	6	37	3

Website – How satisfied are you with the usability of the agency's website, including mobile access to the site?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	1	6	10	29	2

Website (website2) – Does the website contain adequate information about the Bond Review Board and the services provided?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	1	4	10	31	2

Complaints – Are service complaints easy to file?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	1	0	2	45

Complaint Process (complaints2) – If you used the complaint process, was your complaint resolved in a timely manner?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	1	0	1	46

Service Timeliness – Are agency staff members prompt in providing requested information?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	2	5	38	3

Printed Information – Are all reports, instructions or other printed information provided by the agency accurate and easy to understand?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	1	9	6	30	2

Data Portal – Is the Bond Review Board data available on the Texas Open Data Portal and Data Center easily accessible?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	4	4	19	21

Overall Satisfaction – Please rate your overall satisfaction with the agency?					
Poor	Below Average	Average	Above Average	Excellent	Does Not Apply
0	0	4	7	37	0

Representative Sample of Comments Received

- I have always enjoyed working with the Texas Bond Review Board. The staff is always courteous and knowledgeable. They have always been willing to work with us to make sure that we provide the information that is needed in support of our bond authority.

- The resources provided by the agency are excellent. One minor issue I have on occasion is with the Bond Election reporting tool. Sometimes it does not load properly and/or allow the user to download a particular dataset. Otherwise, great work!

- Someone, please give Jamie Backiel a raise!! I have spoken with Jamie by phone and email on several occasions, and she impresses me every time. She is always friendly and has a positive attitude. Her knowledge of the bond program, processes, laws, rules, etc., is outstanding. She is very patient and will explain anything to me that I am not able to wrap my mind around.

- The BRB team has been extremely helpful to my team over the last several years. They are prompt, organized, and have easily understood what we have needed help with. We look forward to working with them again.

- I don't recall ever using the Texas Open Data Portal to access Bond Review Board data. As far as I can recall, I have always either gotten the data and/or publications directly from your website or contacted someone within the agency for additional data (or if I had a question about the data). Most recently, I emailed your Open Records section and asked for data that was then provided to me that same day. Which was great. Over the years, I have always received excellent customer service from BRB and honestly expect that I always will. With that said, I am not an expert on bonds and therefore find some of what you produce difficult to understand at first glance. That's why I only put "Above Average" for question #9. But, whenever I contacted the agency with questions, the answers have been prompt and, upon request, some of the more technical terms, etc. were explained.

- Everyone who works at the BRB is an absolute delight! Extraordinary staff!

- It can be difficult to predict the nature of the information the BRB will request from us to review a bond application. It would help us to prepare for questions if there was clearer guidance ahead of time regarding the financial aspects of a bond application review that staff will ask about. For instance, guidance on the type of project information requested, or the DBC assumptions to make when considering that a cushion may be needed to account for market uncertainty relating to bond premium.

- Regarding a Shamrock EDC 2024 application, for which an allocation was awarded but has been withdrawn for the year 2024, the cooperation and helpfulness of the BRB staff could not have been better.

- Appreciate keeping this info accessible and available to the public. Thanks!

- One of the worst agency websites in the state. To download refreshed data sets you're required to clear your browser history, the board meeting meetings haven't been posted since 10/19/2023, and the calendar on the website isn't accurate (unless the agency is planning to be open on Memorial Day and Independence Day). Additionally, many other agencies post their board books to their website prior to board meetings so the public understands the agenda. Would the Bond Review Board be open to such transparency?

- The BRB staff are all super stars. (Rob, Jamie, Justin, and others). I have worked with the BRB team on a regular basis for over 20 years (mostly on Private Activity Bonds) and have had nothing but positive experiences. They are all very knowledgeable, friendly, responsive, and extremely helpful in answering questions. Their website is very organized and accessible. Really enjoy working with all of you.

- Our main contact at the BRB for questions has been Jamie Backiel. She is always responsive and helpful when we have questions.

- Each time we called, there was a response from the staff, and their guidance on the regulations was excellent.

Estimated Performance for Fiscal Year 2024

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	8.0%

Output Measures

Number of customers surveyed*	531
Number of customers served (yearly)**	7,025

Efficiency Measure

Cost per customer surveyed***	$0.10

Explanatory Measures

Number of customers identified (yearly)**	7,025
Number of customer groups inventoried*	5

* Estimates based on contacts, performance measures, and database results.

** Based on unique hits to the agency website between May 2023 and May 2024.

*** Estimate – Survey is done online; cost reflects staff time to compile survey data.

Customer Service Representative

Robert B. Latsha II
Executive Director
Texas Bond Review Board
P.O. Box 13292
Austin, TX 78711-3292
512-463-9892 (phone)
512-475-4802 (fax)
rob.latsha@brb.texas.gov