

REPORT ON CUSTOMER SERVICE

FOR THE FISCAL YEARS 2003 – 2004

By

TEXAS WATER DEVELOPMENT BOARD

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EXECUTIVE SUMMARY

Summary of Customer Input

Surveys and focus groups of Texas Water Development Board's (TWDB) customers over Fiscal Years 2003- 2004 indicate broad satisfaction with the agency's three core product and service areas—water resources planning, financial assistance, and natural resources information. Using a variety of methods, including written and on-line surveys, point-of-contact cards, and focus group sessions, customer input was sought for the following list of specific processes, products, and services:

- Staff performance and the administration of the Regional Water Planning process
- Staff performance and the administration of the Lake Hydrographic Survey Program
- The financial assistance processes and marketing activities in the Office of Project Finance and Construction Assistance (OPFCA)
- Staff performance and product quality regarding the Texas Natural Resources System (TNRIS)
- The Vision and Mission of the agency for 2005-2009

A brief statement of the results for each customer input initiative is listed below.

Customer Ratings of Staff Performance and the Administration of the Regional Water Planning Groups

A written survey submitted to the sixteen chairs of the Regional Water Planning Groups indicated an average overall satisfaction rating of 4.30 out of a possible high score of 5.

Customer Ratings of Staff Performance and the Administration of the Lake Hydrographic Survey Program

Surveyed customers of the Lake Hydrographic Survey Program responded positively to a basic “yes or no” questionnaire composed of 8 questions, resulting in a 100% positive rating for the staff and the program.

Customer Input of the Office of Project Finance and Construction Assistance Program Processes and Marketing Activities

OPFCA conducted both an on-line survey as well as financial advisor workshops to obtain information that would ultimately improve the effectiveness and efficiency of the agency's financial assistance programs. Some of the valuable suggestions for enhancing the financial programs are listed below:

- Update the application process checklist
- Identify a TWDB central point-of-contact for each project
- Allow for electronic filing of applications
- Streamline State Revolving Fund program requirements on installment closings and procurement

Customer Rating and Input on the Texas Natural Resources Information System Staff Performance and Product Quality

From February 2002 through March 2004, the TNRIS Division collected 79 customer point-of-contact (POC) cards provided to customers upon the receipt of requested reports or maps. Seventy-eight of the 79 cards rated TNRIS' service as "Excellent;" 1 card rated the service "Fair."

Customer Input on the Vision and Mission of the Agency for 2005-2009

On October 15, 2003, the TWDB convened over 60 representatives from a cross-section of the TWDB's customer base in a focus group activity. Group members were asked to provide input regarding the agency's Vision and Mission statements. Key information regarding the agency's strengths, opportunities, and challenges was gleaned from this interactive session. Additionally, the participants identified key policy issues that the TWDB should consider over the next five years in order to fulfill its Vision and Mission.

Customer Satisfaction: A Strategic Goal for 2005-2009

The TWDB's focus on customer service is evident in the 2005-2009 strategic planning process. During this effort, senior staff placed Customer Satisfaction as the number one strategic goal. The agency is currently developing initiatives, tools, and measures that will enhance staff's ability to deliver, monitor, and continuously improve the quality of customer service at the TWDB.

TWDB CUSTOMERS

The strategies listed in the *General Appropriations Act 2004-2005* for the Texas Water Development Board (TWDB) provide a general indication of the wide variety of services provided to our customers: Data Collection and Dissemination, Water Planning, Conservation Assistance, Financial Assistance, and Economically Distressed Areas (providing financial assistance to these areas).

While ultimately all individuals in Texas are the TWDB's customers, a large-scale survey of this sort is cost-prohibitive. The present customer service report provides insight into specific customer groups using varied methods of data collection. For some groups, collection methods such as open-ended survey questions and focus groups are designed to collect customer input on major issues and areas for improvement of services.

The present customer service report focuses on the following specific areas: work with Regional Water Planning Groups (RWPG) to plan the future of water in Texas; offer services for data collection, dissemination as well as technical assistance; provide loans and grants to communities in need; and offer over-the-counter provision of maps and aerial photos.

BACKGROUND

Part of the TWDB's initiative to assess the effectiveness of the agency's programs and services, has been to regularly commission a comprehensive survey on customer satisfaction. The TWDB first began to elicit customer feedback in 1993 with the creation of an External Customer Survey designed to determine how effectively the agency's programs and services were meeting customers' needs. The agency also conducted surveys in 1996, 1998, 2000, and 2002. The 2000 and 2002 surveys were performed under contract with the Public Policy Research Institute, and the Survey Research Center of the University of North Texas, respectively. The findings of these surveys indicated strong general satisfaction overall with the services provided by the TWDB. In the 2002 survey, 94.8% percent of customers responding to the survey gave the agency an Excellent or Good rating.

DATA COLLECTION METHODS

Information obtained from prior surveys indicated general satisfaction with the services offered by the TWDB, but only provided limited customer input regarding how the agency could improve services. In Fiscal Year (FY) 2003-2004 the TWDB collected information from customers through written and on-line surveys covering specific agency programs, point-of-contact cards for customers ordering and receiving printed products, and an intensive focus group workshop that addressed agency-wide issues. These varied methods of data collection, while less structured than an overall large-scale survey, allowed for a focus on specific areas in the TWDB, providing in some instances more in-depth qualitative information that can be used to better design and execute the TWDB strategies. Collection of qualitative information also affords more information with which to construct new questions for future larger-scale surveys.

Table 1 briefly indicates the type of data collection done and the customer group to which each pertains. Each group is discussed separately throughout this report.

Table 1. Data Collection Methods	
Technical Assistance Customers	Questionnaire
Planning Groups	Questionnaire
Financial Customers	Customer Workshops/ On-line Questionnaire
TNRIS Customers	Point-of-Contact Cards
Various Customer Groups	Focus Group Workshops

CUSTOMER EVALUATIONS OF PRODUCT/ SERVICE QUALITY AND STAFF PERFORMANCE

Customer Ratings of Office of Planning Staff Performance--Regional Water Planning Groups

In the Office of Planning, a written survey on TWDB Staff Performance for Fiscal Year 2003 was administered to all of the 16 chairs of the Regional Water Planning Groups, that are supported throughout the year by TWDB project managers and other members of the TWDB Planning staff.

Each chair of the 16 Regional Water Planning Groups evaluated the support provided by the TWDB project manager and other TWDB Planning staff by answering 6 questions regarding project management and technical assistance, and 1 question on overall satisfaction using a scale from 1 (strongly disagree) through 5 (strongly agree), with a rating of 5 being the highest possible positive rating for each question/statement (see Figure 1).

Planning Staff received an average overall rating of 4.30 out of a possible high score of 5 from the 16 Regional Water Planning Group chairs.

In the area of Project Management, the project manager's ability to provide the necessary guidance to ensure that the Planning Group successfully completes all required tasks was ranked highest of all the statements, receiving an average rating of 4.5 from the 16 chairs. Timely and appropriate guidance from TWDB staff received an overall average of 4.44. Timely and appropriate administrative assistance was rated at an average of 4.38, as was the satisfaction level with the way the project manager administers the TWDB contract.

In the area of Technical Assistance, the TWDB staff's ability to provide the Planning Group with the necessary technical assistance was rated at an average of 4.13 by the 16 chairs. The TWDB staff's ability to provide technical assistance in a timely and appropriate manner received an overall average rating of 4.

Figure 1. Questionnaire for RWPGs

Region _____

TWDB Staff Performance Survey for Fiscal Year 2003

Please evaluate the support provided to you by the TWDB Project Manager and other TWDB staff assisting your Planning Group by circling the rating that best reflects your agreement with each statement below, using the following scale:

1=Strongly disagree 2=Disagree 3=Neutral 4=Agree 5=Strongly agree

The TWDB managers will review, summarize and analyze your responses. Managers will determine the most beneficial method for communicating survey results to TWDB staff.

Project Management	Rating				
The Project Manager provides the necessary guidance so that my Planning Group can successfully complete all Planning tasks.	1	2	3	4	5
TWDB staff provides my Planning Group guidance in a timely and appropriate manner.	1	2	3	4	5
TWDB staff provides my Planning Group administrative assistance in a timely and appropriate manner.	1	2	3	4	5
My Planning Group is satisfied with the way the Project Manager administers the TWDB contract.	1	2	3	4	5
Technical Assistance					
TWDB staff provides my Planning Group with the necessary technical assistance.	1	2	3	4	5
TWDB staff provides my Planning Group technical assistance in a timely and appropriate manner.	1	2	3	4	5
Overall					
Overall I am satisfied with the support my Planning Group receives from the TWDB toward the Regional Water Planning process.	1	2	3	4	5

Would you like to be contacted to discuss your experience with individual TWDB staff?
 Yes No

Signed: _____ Date: _____
RWPG Chair

Please provide any written comments on the back of this form. Thank you for your feedback.

Customer Ratings of the Lake Hydrographic Survey Program and Staff Performance

Customers who contracted with the TWDB's Lake Hydrographic Survey Program (Office of Planning) to survey lakes to determine sedimentation activity and lake volume were asked to respond "yes" or "no" to a questionnaire composed of 8 questions. Questionnaires were sent to 4 clients who owned 5 lakes for which final reports were complete.

The 8 questions involved operations efficiency, information flow, knowledge of staff, professional conduct, suitability of equipment, value of services, ability to satisfy customer needs, and willingness to use the program in the future. Each of the 5 customers receiving Lake Hydrographic Survey Program services provided responses to the written survey (see Figure 2).

Figure 2: Questionnaire for Hydro Survey Customers

CUSTOMER SATISFACTION QUESTIONNAIRE FOR THE HYDRO SURVEY PROGRAM		
1	Was the field data collection completed within the estimated time frame?	yes no
2	Did the survey crew keep you informed of the progress of the field data collection?	yes no
3	Was the survey crew knowledgeable in explaining how the data was collected?	yes no
4	Did the survey crew conduct themselves in a professional manner?	yes no
5	Did the boat and survey equipment seem suitable to the task?	yes no
6	Do you believe you received good value for your money?	yes no
7	Was the survey crew thorough enough in their data collection to satisfy customer needs?	yes no
8	Would you be willing to use the Hydrographic Survey Program again?	yes no

All surveyed customers responded positively to each question, resulting in a 100% positive rating for the program. Respondents were encouraged to provide additional comments/suggestions in order to improve the program. A suggestion that TWDB staff should increase follow-up efforts with the customer to see if anything else is needed or to determine if there are additional questions will be utilized to enhance the program.

Customer Input of the Office of Project Finance and Construction Assistance Program Processes and Marketing Activities

In the Office of Project Finance and Construction Assistance (OPFCA), financial advisor and bond counsel workshops were conducted, and an on-line customer survey was developed and placed on the agency's home page in late 2003 (see Table 2). The ultimate goal was to obtain information that would help the TWDB modify its programs and practices to increase the utilization of the financial assistance programs.

Workshops

Staff from OPFCA conducted three one-half day workshops with the financial advisor and bond counsel community in December 2003, January 2004, and February 2004. The meetings were held in Austin, Dallas, and Houston, respectively. Outside attendance at the workshops was 7, 15, and 9 respectively. The individuals who comprise this community are normally hired by the loan applicants to prepare the general, legal, and financial components of loan applications. This community is represented by attorneys and accountants who specialize in debt issuance and have an intimate knowledge of financing through public and commercial channels. They were also asked to continue providing feedback through a suggestion form on the agency's website. As of May 21, 2004 there have been 8 web feedback submissions.

On-Line Questionnaire

The on-line questionnaire was designed for agency customers who had applied for and/or received agency financial products and services, or those serving as bond counsel or financial advisor for customers seeking financial assistance through the agency's programs. It was composed of 7 questions involving the loan application process, closing process, marketing effectiveness, satisfaction of clients' needs, program accessibility, inspection during project construction, and monitoring for compliance with bond and loan provisions (see Table 2). This questionnaire can also be used for other consultants (i.e., engineers).

The open-ended questions of the questionnaire were designed to elicit customer comments in each area in order to obtain valuable information that might not otherwise be gained from closed-ended survey responses or workshops. The comments collected have and will be used to improve the various financial program processes and marketing activities, and to improve the existing survey instrument itself, for future respondents.

The survey was advertised only to the attendees of the workshops. On-line responses were received from 7 of the agency's financial assistance program customers. This represents only 22% of all financial advisers and bond counsels who attended the workshops. The data collected so far are quite useful.

**Table 2: Texas Water Development Board
Office of Project Finance and Construction Assistance
Customer Survey
November 2003**

1. Application process – Is our application process clear and identifiable? If not, what suggestions do you have in improving this process? Please include any specific problems or obstacles that you have encountered during the process. If you feel there is no need for improvements, please let us know that, as well.
2. Closing process – Do you know the procedures/process for closing a loan and /or grant with our agency? If not, how would you suggest that we make the closing procedures/ process available and easily obtained?
3. Marketing – What marketing avenues are most effective for your clients? Does the marketing we currently do, target your clients? How best could we get our funding resources/marketing materials out to you and your clients?
4. Do we meet your client’s needs? If not, how would you suggest we change our marketing and our programs to better meet their needs?
5. Accessing the programs - Do our marketing materials provide sufficient information on how to access our programs? Is the web-site helpful? Any suggestions?
6. Inspection – Do we provide adequate information and/or assistance during project construction?
7. Monitoring – Do we provide your customers with the assistance and tools that achieve your client’s best opportunity to comply with loan and bond provisions?

Feedback Received

Many positive comments were received from both the workshops and the on-line survey. All in attendance at the workshop stated that the meeting was productive and should be repeated on an ongoing basis as a means to improve and keep constant the lines of communication.

Some of the comments provided include improvements that can be put into effect immediately; others will require more time to implement and still others will require coordination with the Board’s bond counsel, the Board, or the U. S. Environmental Protection Agency (EPA) for further discussion.

The most significant comments/suggestions provided by respondents we utilize to market and enhance the financial programs processes are listed in Table 3. Several items indicate the desire for new or alternative methods of communication--both out to the customers (e.g., e-mail marketing efforts) and in from them (e.g., on-line applications). Other items suggest various improvements in program processes.

Table 3: Suggestions for Enhancing Financial Programs Processes and Marketing
<ul style="list-style-type: none"> • Update the application process checklist
<ul style="list-style-type: none"> • Identify a TWDB central point of contact for each project
<ul style="list-style-type: none"> • Allow for electronic application filing rather than printed applications with multiple copies
<ul style="list-style-type: none"> • Develop an on-line checklist for requirements prior to loan closing
<ul style="list-style-type: none"> • Streamline State Revolving Fund program requirements on installment closings and procurement
<ul style="list-style-type: none"> • Provide seminars throughout the state or at conferences to explain TWDB’s financial programs
<ul style="list-style-type: none"> • Increase financing program marketing efforts to include women- and minority-owned bond counsel or financial advisors
<ul style="list-style-type: none"> • Use e-mail to market programs to issuers and to the public finance community
<ul style="list-style-type: none"> • Conduct regular conference calls or meetings on complicated projects
<ul style="list-style-type: none"> • Develop methodologies to provide financial advantages to borrowers who are willing to work collaboratively with other entities in regional initiatives
<ul style="list-style-type: none"> • Provide periodic e-mail notices referencing any new financial program updates to the website
<ul style="list-style-type: none"> • Include consultants in all issues discussed with clients
<ul style="list-style-type: none"> • Adopt standards and procedures consistent with commercial bond programs

Customer Rating and Input of the Texas Natural Resources Information System (TNRIS) Staff Performance and Product Quality

In the Resource Information Office, the Texas Natural Resources Information System (TNRIS) division administers printed point-of-contact (POC) cards to customers upon their receipt of requested reports and maps. The POC cards contain the date of service, the staff who assisted the customer, and a ranking of “Excellent,” “Good,” “Fair,” “Need Improvement,” and “Poor.” It also allows for the recipient to provide their own input which may include comments on turnaround time, helpfulness and knowledge of staff, courtesy and friendliness of staff, quality of the product, staff’s willingness to accommodate the needs of the customer, and other general comments. Suggestions for improvement are also solicited (see Figure 3). From February 2002 through March 2004, TNRIS collected customer input based on data from 79 POC cards.

Figure 3. TNRIS POC Cards

Our Service Depends on You!

Date _____

Assistant _____

Name _____

Company _____

Phone _____

Was the service:

Excellent

Good

Fair

Need improvement

Poor

Comments or suggestions: _____

Service you would like us to provide: _____

TNRIS
The Texas Information Gateway
www.tnr.is.state.tx.us

Seventy-eight of the 79 cards rated the service “Excellent.” One card rated the service “Fair.” The customer’s comments were categorized according to common themes in service provision and the number of responses received in each category are summarized in Table 4 below.

Table 4: Most Frequent Responses to TNRIS POC Cards	
• Turnaround time/Promptness of service	19
• Helpfulness and knowledge of staff	13
• Courtesy and friendly behavior of staff	7
• Quality of the product	4
• Staff's willingness to accommodate the needs of the customer	6
• General positive comments	16

No comments were provided on 14 of the 79 POC cards received. The most significant suggestions for improvement to TNRIS products and staff services are included in Table 5.

Table 5: Suggestions for Improvement and Added Services TNRIS POC Cards
• Providing more maps in digital format, especially historical maps
• Training for customers in using the aerial photo files in doing historical research
• On-line viewing and ordering of wetland and historical maps
• Listing of aerial maps available on the website

Customer Focus Group Workshop: Input of TWDB Vision and Mission Statements

On October 15, 2003, the agency made a concerted effort to collect extensive customer input that went beyond collecting data on levels of satisfaction with staff performance and/or the TWDB's various products and services. Eighty-one of the agency's external customers were invited to participate in a focus group workshop to discuss the agency's Vision and Mission (as developed by the Board members), as well as the agency's priorities for the next 5 years, and the forces working for and against the agency's success in meeting its goals. Over 60 representatives from a cross-section of the TWDB's customer base participated in the focus group activity. The customers were divided into the seven 7 functional groups listed in Table 6 below.

Table 6: Functional Group Representatives Participating in Focus Groups
Financial (Bond Counsel, Financial Advisers)
Planning/Groundwater Management/Private Interests/Data
Sister Agencies – Federal
Sister Agencies - State (Texas)
Environmental and Civic
Agriculture
Customers and Recipients

Each group was assigned a TWDB staff member to facilitate group discussion and to assist in recording each group's input. Group members were asked to provide feedback on the vision and mission statements developed by the TWDB Board members and executive staff. Key information regarding the agency's strengths, weaknesses, opportunities and threats was gleaned from this interactive session. Attendees cooperatively identified key policy issues that the TWDB should consider in the next 5 years in order to fulfill its responsibilities to the state. Some legislative staff also attended to hear first-hand the issues raised by this cross-section of

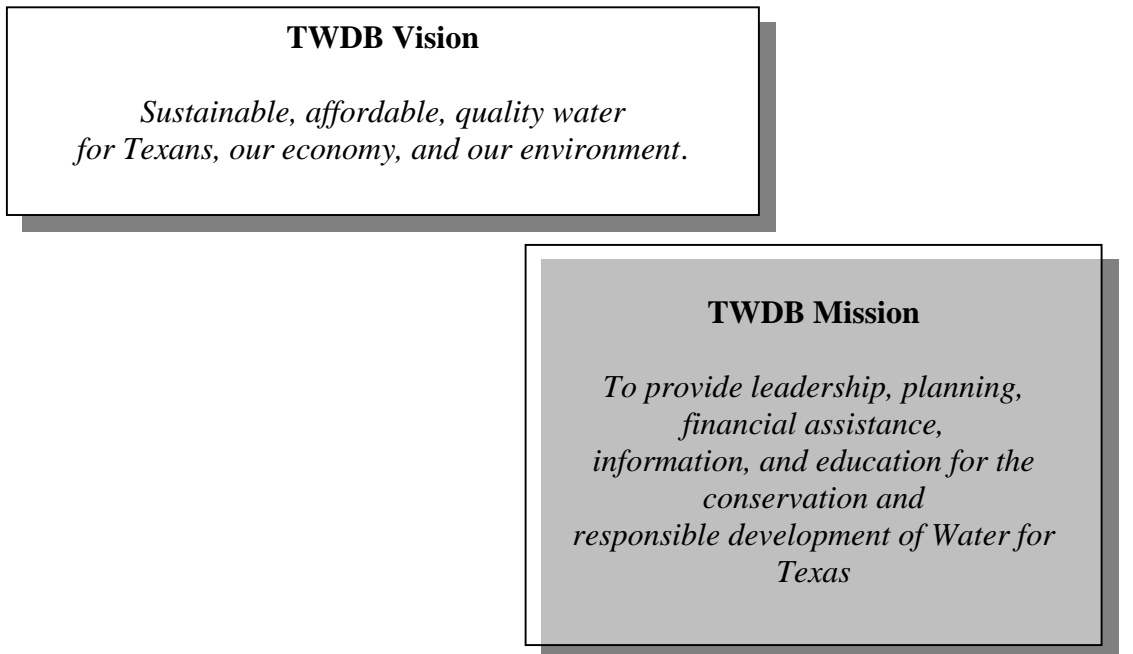
TWDB's customers.

Agreeing that a Vision Statement is the long-term picture of a desirable future, the customers suggested that the TWDB should work toward achieving a sustainable water supply for Texas. Additionally, the participants felt that the words "clean" and "safe" could be adequately captured in the single word: "quality." Customer comments on the agency's mission for the future affirmed the definition of the agency's core services as financial assistance, planning, and technical services, but diverged on the role of the agency in policy development. Additionally, the participants confirmed that the ultimate outcomes of the agency's work should be conservation and the responsible development of water.

Considering the guidance from the Board members, along with customer input, staff met the day after the customer focus group workshop to develop final Vision and Mission Statement proposals. Staff determined that the customers' specific suggestions for changes to the two statements were in unison with the overall direction provided by Board members.

The Vision and Mission Statement development process utilizing customer input resulted in the final approved Vision and Mission statements in Figure 4.

Figure 4. Vision and Mission Statements



Customer Focus Group Workshop: Customer Feedback on the Workshop

Customers were given the opportunity to provide feedback via an evaluation form that listed 4 questions, using a rating scale of 1 – indicating “strongly disagree” and 5 – indicating “strongly agree.” The average score for the 12 survey respondents on the question, “The session provided me with a meaningful opportunity to express my thoughts about the future activities of the TWDB,” was 4.58. The evaluation form results also indicated high interest in participating in future events: the average score for the question, “I would be interested in participating in similar opportunities/events in the future,” was 4.42. Additional comments emphasized interest in receiving information regarding how the results of the workshop would be used.

IMPACTS OF CUSTOMER INPUT ON TWDB ACTIVITIES

The TWDB is responding to customer input gained from the various surveys by utilizing this method in helping to determine its upcoming legislative initiatives and priorities..

In response to customer input, the Office of Project Finance and Construction has implemented several changes and made improvements in communication and processes. It is continuing to seek additional customer input and analyze recommendations.

- An internal team was formed to address the loan closing process, with the objective of facilitating and speeding up the loan closings on all projects.
- The TWDB has reduced the number of copies of applications from 10 to 8, and is allowing appropriate pre-application conferences to be conducted by phone.
- It is analyzing how to simplify and consolidate the loan application requirements that differ between various assistance programs and is considering how best to implement on-line applications.
- Information sheets on the various financial programs have been developed and/or updated and widely distributed.
- News articles on the new and expanded programs have been submitted to industry publications throughout the state in order to reach potential and existing customers.
- The TWDB is also planning to implement a newsletter e-mail system to inform applicants and their representatives of important events, and program developments. Staff is planning to provide additional customer service orientation and training.
- Discussions of commitment of additional agency resources to the marketing of its financial programs are currently underway.
- TWDB’s external marketing efforts have been enhanced.
- Financial product information, along with information on all agency programs, has been made available to the public through an increasing number of exhibits at various venues.

- Over the last few months, TWDB staff has distributed informational literature and contact information to attendees at several conferences and fairs, including those conducted by the following:
 - Texas Municipal League
 - Texas Water Conservation Association
 - Texas Rural Water Association
 - Texas Section of the American Water Works Association
 - Office of Rural and Community Affairs Annual Rural Summit
 - Texas Commission on Environmental Quality Environmental Fair
 - Upcoming planned exhibits are set for conferences of the Association of Water Board Directors, and the Texas Rural Partners/Texas Rural Health Association

The TWDB web site, the agency's primary interface with the public, was re-designed and launched in November 2003. The new format includes user-friendly drop-down menus designed to make information readily available from the home page. Customers were provided with a link to the web work group to indicate any suggestions for improving the site, or to report any technical difficulties. Discussions are currently underway to develop an on-line agency customer survey for gathering input on a wide variety of agency products and services.

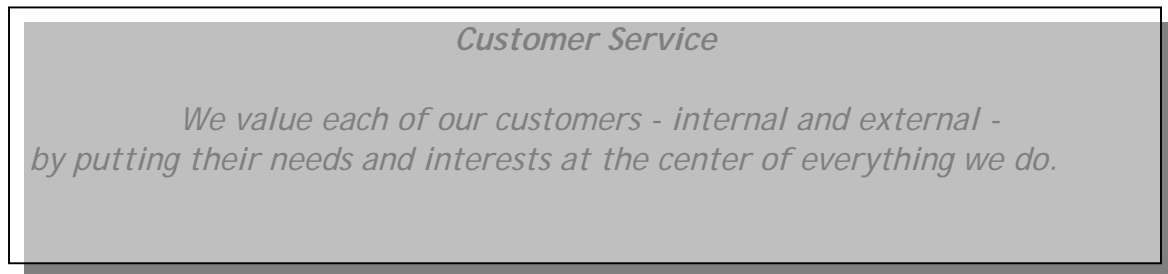
CUSTOMER SATISFACTION AND THE BALANCED SCORECARD

The TWDB's increasing emphasis on customer input and satisfaction is clearly evident in its current strategic planning process. The agency has placed Customer Satisfaction as its number one priority using a Balanced Scorecard strategic planning method.

The process for building a Balanced Scorecard mirrors the core activities for creating a strategic plan: the agency reviews and enhances its current vision, mission, philosophy, goals, objectives and measures. The agency then seeks to unify and focus the whole organization around a collective vision and mission, that aligns the agency activities with the mission, and creates valuable measures that will show the agency's progress toward achieving its mission. Executive and other TWDB staff received formalized training in the Balanced Scorecard method.

At the outset of the Balanced Scorecard strategic planning process, TWDB leadership established a set of core values to guide every decision made throughout the process. Customer Service was listed as a core value:

Figure 5: Core Value – Customer Service



In developing the proposed strategy map, Executive staff placed the highest priority on “Increase Customer Satisfaction,” which appears as the top strategic goal. The Implementation Team, a cross-functional group of TWDB staff trained in the Balanced Scorecard method, has developed a set of preliminary measures designed to track the level of customer satisfaction. These preliminary measures include processes to identify new customers and customers who have received more than one product and/or service from the agency (repeat customers). We hoped that these processes will result in improved outreach and marketing efforts, as well as help the agency better identify the needs of its customers, and develop methods/products/services to satisfy those needs. A formalized customer survey and a detailed marketing plan have been identified as initiatives under this strategic goal.

Other strategic categories identified by the Executive staff in the proposed strategy map include:

- Develop recommendations to ensure water for Texas
- Optimize financial assistance programs
- Strengthen external partnerships
- Support legislative process
- Market TWDB
- Attract and retain quality workforce
- Develop staff
- Foster internal communication
- Encourage innovation
- Secure non-state funding
- Manage state appropriations
- Increase data collection and dissemination capabilities

With customer input and increasing customer satisfaction at the core of the agency’s strategic planning process, the TWDB will continue to strengthen its efforts to facilitate customer involvement in all of its activities. By increasing opportunities for customer input, the TWDB will continue to increase its responsiveness to customer’s suggestions. The agency’s highest goal of increasing customer satisfaction will be supported in all of its strategic decisions and should continue to be reflected in all of its products and services.