



CITY OF SAN ANTONIO

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January 5, 2026

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SUBJECT: Audit Report of 311 Customer Service Operations

Mayor and Council Members:

We are pleased to send you the final report of the 311 Customer Service Operations. This audit began in March 2025 and concluded with an exit meeting with department management in October 2025. Management's verbatim response is included in Appendix C of the report. 311 Customer Service management and staff should be commended for their cooperation and assistance during this audit.

The Office of the City Auditor is available to discuss this report with you individually at your convenience.

Respectfully Submitted,

Buddy Vargas, CPA, CIA, CFE
City Auditor
City of San Antonio

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**CITY OF SAN ANTONIO
OFFICE OF THE CITY AUDITOR**

311 CUSTOMER SERVICE
AUDIT OF 311 OPERATIONS
PROJECT NO. AU25-001
JANUARY 5, 2026

BUDDY VARGAS, CPA, CIA, CFE
CITY AUDITOR



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Executive Summary

As part of our annual Audit Plan approved by City Council, we conducted an audit of the 311 Customer Service Department specifically 311 operations. The audit objective, conclusions, and recommendations follow:

Determine if 311 processes and systems are operating effectively and interfaces with department work order systems are functioning properly.

Overall, 311 has effective controls in place for call taking; Customer Service Representative (CSR) training; knowledge base and 311 updates; and call center backup operations. 311 answers citizen calls timely and conducts annual training. 311 performs reviews over the knowledge base periodically and information updates are made as needed. Lastly, 311 has effective controls in place for backup procedures and generator reviews.

However, we identified areas where controls could be improved over CSR coaching; aging reports; reclassified/reassigned service requests; and system access. 311 management is not ensuring that CSRs with unmet call metrics are coached. In addition, SLA timeframes are not accurately reflected in CRM. Closed service requests in Chameleon are not integrating as closed back to CRM. Also, 311 is not addressing reclassified and reassigned service requests timely. Finally, access to Calabrio and CRM is not appropriate.

We provided recommendations to management to strengthen controls and resolve identified issues. 311 management agreed with the audit findings and has developed positive action plans to address them. Management's verbatim response is in Appendix C on page 13.

Background

Overview

The 311 Customer Service Department (311) provides resources for the citizens of the City of San Antonio (the City) to assist with city-related service requests such as potholes, stray animals, graffiti, non-functioning traffic lights, etc. Citizens may use the 311 call center phone number, website, or mobile application to make inquiries or create service requests. If a citizen chooses to call in, one of the 47 Customer Service Representatives (CSR) answers the call, provides information, and/or creates a service request based on concerns. **Table 1** provides a summary of calls received and answered for FY 2025. **Table 2** provides the number of service requests opened by type for FY 2025.

Table 1: Calls Received and Answered During FY 2025

Language	# of Calls Received	# of Calls Answered	% of Calls Answered
English	706,412	686,805	97.22%
Spanish	34,440	33,513	97.31%
Total	740,852	720,318	97.23%

Source: Cisco Analyzer

Table 2: Service Requests by Type During FY 2025

Service Request Channel	Number of Service Requests Opened
Created by 311 CSR via CRM	319,484
Created by Citizen via 311 App	44,649
Created by Citizen via 311 Website	65,742
Created by DSD Code Enforcement via Accela	73,728
Sub Total	503,603

Source: CRM

Systems

Multiple systems are used for 311 operations. Cisco Webex Center allows the CSRs to take calls. Reports may also be pulled from this system for management to track items such as CSR login/logout time and talk time. Calabrio is used to record calls for monitoring purposes. Customer Relationship Management (CRM) is the primary system 311 uses to create, search, and track service requests as they come in.

In addition to the 311 systems, multiple systems integrate with CRM to route service requests to the appropriate departments for processing. The following lists each system and the corresponding departments involved:

- Chameleon is used by Animal Care Services (ACS).
- SAP is used by Parks and Recreation, Solid Waste Management, and Public Works.
- Accela is used by Development Services Department (DSD).
- Digital Health is used by Metro Health. However, this system does not integrate with CRM, and service requests are created in this system and closed out manually by staff.

Other departments' service requests are tracked in CRM. **See Appendix A** for a flowchart of the systems involved.

Aging Reports

Monthly, 311 delivers an aging report to each of the applicable departments, which provides them with outstanding service requests. The departments are responsible for reviewing the report and addressing these service requests.

Metrics and Citizen Satisfaction

CSRs are individually evaluated based on Talk Time, Not Ready Time (time not spent on calls), and quality assurance review scores, with monthly averages reviewed individually with the CSRs. In addition, metrics are reported in both the City's 24/7 Performance Report as well as the Annual Adopted Budget. Examples of metrics include total calls received, service requests processed, and call center answer rate.

Audit Scope and Methodology

The audit scope was October 2023 through May 2025 and included CSR training; 311 operations; applicable systems; backup processes; and access controls.

To gain an understanding of department operations, we interviewed 311 personnel and performed walkthroughs over applicable systems, training, performance metrics, Service Level Agreements (SLAs), backup procedures, and physical access to the call center. 311's Standard Operating Procedures (SOPs) were our primary criteria for this audit.

In addition, as part of our testing procedures we examined the following areas:

- Determined if citizen calls are answered timely.
- Confirmed if there are effective processes in place for call taking during a system outage.
- Determined if 311 management is communicating outstanding service requests to applicable departments and updating the SLA timeframes as needed.
- Confirmed if CSR calls and metrics are reviewed consistently, and areas for improvement are addressed with applicable CSRs.
- Performed data analysis to evaluate whether data is integrating across systems as intended.
- Reviewed if access to 311 systems and physical call center is appropriate.

We relied on computer-processed data in CRM to obtain listings of service requests to test SLAs and integration of data. We also used Cisco Webex to obtain call data and reports for testing 311 metrics. In addition, we relied on data processed in backend systems (Accela, Chameleon, Digital Health, and SAP) to obtain listings of applicable service requests to test service request status and effectiveness of data integration. Our reliance was based on performing direct tests on the data rather than evaluating the system's general and application controls. We do not believe that the absence of testing general and application controls influenced the results of our audit.

We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

Audit Results and Recommendations

311 has effective controls in place for call taking; Customer Service Representative (CSR) training; knowledge base and updates; and call center backup operations.

311 answers citizen calls timely and conducts annual training. We reviewed call reports for the period August 2024 through April 2025 (9 months) and determined each month the 311 call center reached their goals of average call answer time of 45 seconds or less, average talk time of 3 minutes and 28 seconds or less, and abandoned calls¹ are minimal compared to total call volume (ranging from 0.69% to 2.11% of total calls monthly). Additionally, 311 personnel are performing annual training. We requested support of attendance of the most recent annual training for 52 individuals and determined personnel are completing their annual training.

311 performs reviews over the knowledge base periodically, and information updates are made as needed. The knowledge base provides citizens and CSRs with access to information such as hours of operations, trash collection schedule, and other frequently asked questions. We reviewed a sample of 3 months' correspondence between 311 and applicable departments. As a result, the audit team identified 27 requests were made for updates to the knowledge base across 12 departments. Furthermore, we confirmed all 27 changes were made by 311.

Lastly, 311 has effective controls in place for backup procedures and generator reviews. We reviewed the documented backup procedures for system, telephone, computer, and building service issues, and determined the procedures were effective. In addition, we reviewed the 2 most recent annual generator inspections and monthly generator reviews performed by the Building and Equipment Services Department (BESD). We confirmed 311 maintained appropriate support, and significant issues were not identified.

However, we identified areas where controls could be improved over CSR coaching; aging reports; reclassified/reassigned service requests; and system access.

A. Call Service Representative Coaching

311 management is not consistently ensuring CSRs with unmet call metrics are coached. We reviewed talk time and not ready scores for 13 CSRs across 6 months and identified 3 CSRs which were not coached over their unmet metric(s) across one or more months. In addition, we

¹ Abandoned calls are those that come through Cisco Webex, however, the citizen hangs up before a CSR can answer the call.

reviewed 311's Performance Measures SOP and determined it is outdated as it reflects inaccurate metric goals.

Per 311, CSRs are expected to meet the goals of 3 minutes and 28 seconds for talk time and 5% for not ready time. Additionally, per the Performance Measures SOP, if the CSRs do not meet the established goals, the CSR must receive performance accountability coaching by management. For the sample reviewed, 311 did not consistently execute controls to ensure coaching is provided. This may lead to CSRs being unaware of opportunities for improvement which can have an impact on customer service.

Recommendations

The 311 Director ensure CSR coaching is performed as applicable and update the Performance Measures SOP to accurately document current metric goals.

B. Inaccurate Aging Reports

Currently, inaccuracies in service level agreements (SLAs) and system integration issues are contributing to inaccurate aging reports which are provided by 311 and used by departments to address outstanding service requests. In effect, departments are unable to determine which service requests are truly past due.

B.1 Service Level Agreements

SLA timeframes are not accurately reflected in CRM. 311 maintains a department listing of SLAs which outlines timeframes for service request completion. Additionally, SLAs are programmed into CRM which are used to create monthly aging reports. We reviewed a sample of 208 (of 246) service request types used during January 2025 and the accuracy of their SLAs between the department listing and CRM. We identified incorrect SLAs within CRM for 13 of the 208 (6%) service request types reviewed. For example, one service request type listed a completion timeframe of 3 hours on the department listing versus 10 calendar days in CRM. The correct SLA was 3 hours. In addition, for 29 (14%) service request types we were unable to determine the accuracy of the SLAs as reported by the departments as they were not listed on the CRM SLA listing.

It is best practice to ensure SLAs are accurate within CRM to ensure accurate tracking, completion, and accountability over service requests. 311 currently does not have procedures in place to verify the accuracy of the SLAs within CRM.

B.2 System Integration

Closed service requests in Chameleon are not integrating as closed back to CRM which is contributing to inaccurate aging reports. We performed data analysis to confirm whether service requests marked as closed in the backend systems (e.g., Accela for DSD, Chameleon for ACS, and SAP for other departments) integrated as closed back to CRM. The 311 department uses CRM to track statuses of service requests and generate monthly aging reports. While integration issues were not identified with Accela and SAP, issues were identified with Chameleon. The audit team analyzed 8,622 service requests closed in Chameleon during January 2025 and identified 85 (1%) that did not integrate into CRM with a closed status. Integration between CRM and backend systems occurs in real-time.

Per the 311 System Training Manual, CRM integrates with several backend systems which communicate information to and from CRM. At the time of testing, 311 did not have procedures in place to verify service requests are integrating as closed between the backend systems and CRM.

Per our analysis of the service requests that were open as of January 2025 within CRM (as detailed in **Table 3** below), we identified service requests which are not being closed within the required SLAs. However, due to the issues identified with service level agreements and system integration, the reports produced from CRM are not reliable.

Table 3: Service Requests Past SLA by Department as of January 2025.

Department	Service Requests Reviewed	Service Requests Past SLA	% Past SLA
Solid Waste	13,377	780	6%
Animal Care Services	8,622	1,823	21%
Development Services	4,692	138	3%
Public Works	4,285	401	9%
Parks and Recreation	1,111	193	17%
Human Services	240	16	7%
Metro Health	200	11	6%
311	38	4	11%
Historic Preservation	11	3	27%
Total	32,576	3,369	10%

Source: CRM

Recommendations

B.1 The 311 Director correct the SLAs within CRM that were identified to be inaccurate and develop controls to periodically review SLAs to ensure accuracy within CRM.

B.2 The 311 Director in collaboration with ITSD, develop procedures to verify integration of service requests between CRM and backend systems. Additionally, evaluate current Chameleon cases and close out in CRM as applicable.

C. Reclassified/Reassigned Service Requests

311 is not addressing reclassified and reassigned service requests timely. Service requests require reclassification or reassignment by 311 if they are assigned to the incorrect department or service type. We reviewed a listing of 9,512 service requests that were sent to the reclass/reassign queue between October 2024 and July 2025 (10 months) and identified 149 (1.6%) closed service requests that were pending reclassification/reassignment between 7 and 79 days.

Per the 311 Customer Service Process SOP, 311 is responsible for reviewing and recreating service requests that are reclassified/reassigned by City departments. Controls are not in place to ensure these service requests are handled timely which is contributing to delays in service request completion.

Recommendations

The 311 Director ensure all outstanding requests are reclassified/reassigned. In addition, establish controls to ensure any future reclass/reassign service requests are recreated timely.

D. System Access

Access to Calabrio and CRM is not appropriate. As part of our testing procedures, we reviewed the user access listings for Calabrio and CRM as of May 2025. We determined 3 of the 63 individuals with access to Calabrio no longer required access as they were separated City employees or did not require access per their job title. In addition, we determined 4 of 277 individuals with access to CRM did not require access per their job title. These users' access should have been delimited between 2.5 and 11.5 years ago.

While 311 management performed a review over CRM access in August 2024, their review did not identify these 4 individuals with inappropriate access, and therefore access was not delimited. Further, a user access review process does not exist for the Calabrio system.

Per Administrative Directive 7.8d – Access Control, access to City systems is based on an individual's membership to a group and job function. Access must be disabled upon separation of the employee. Currently, 311 management does not perform user access reviews over

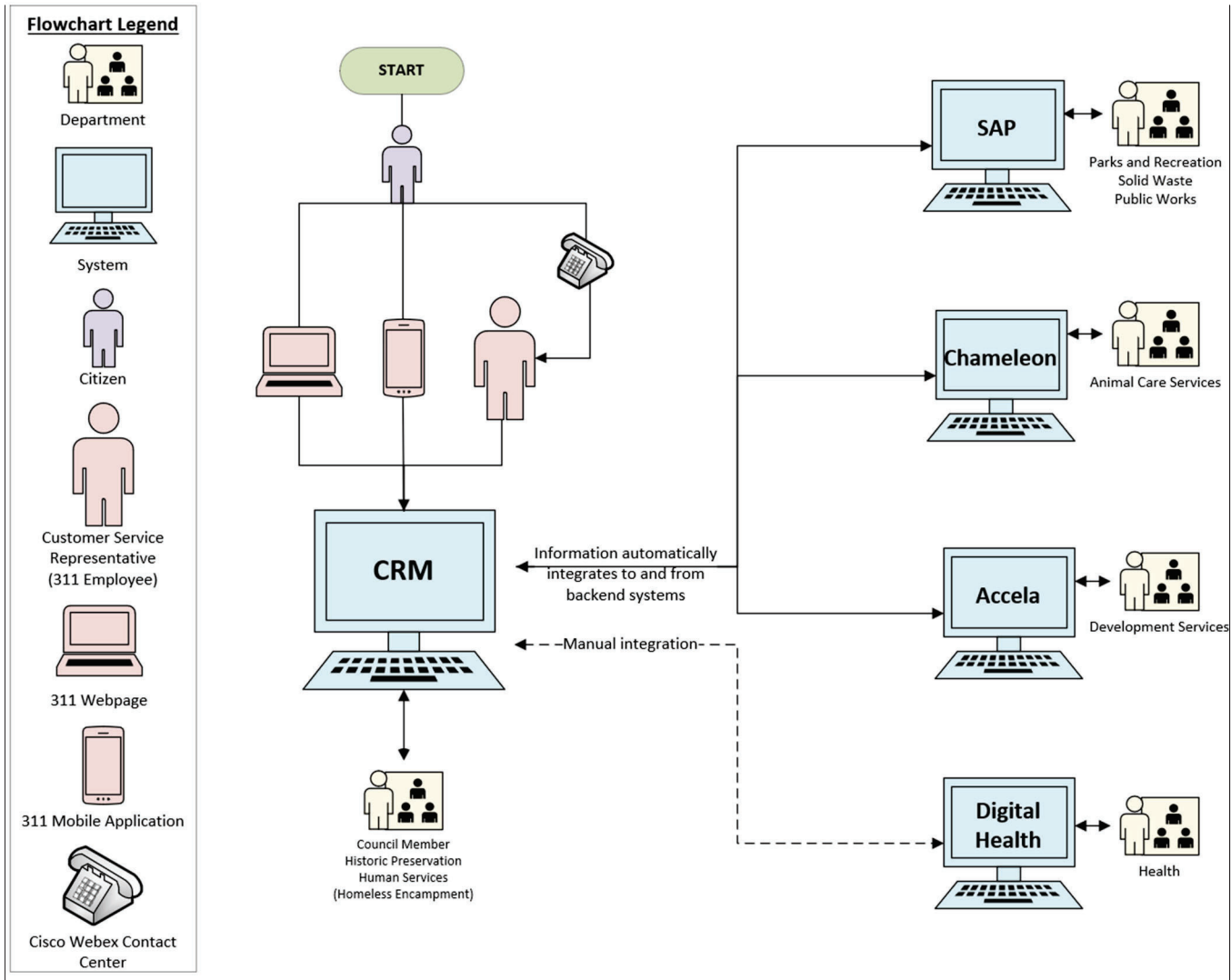
Calabrio and is not conducting effective semi-annual user access reviews for CRM, contributing to inappropriate system access.

Recommendations

The 311 Director:

- Delimit access for inappropriate users within Calabrio and CRM,
- Establish a periodic access review over Calabrio, and
- Modify the semi-annual reviews over CRM to ensure access is delimited accordingly.

Appendix A – 311 Systems and Data Integration



Source: Compiled by Audit Team

Appendix B – Staff Acknowledgement

Abigail Estevez, CPA, CIA, CISA, Audit Manager

Loretta Faxlanger, CFE, Auditor in Charge

Rudy Carrasco, Auditor

Francisco Narvaez, Auditor

Appendix C – Management Response



CITY OF SAN ANTONIO

SAN ANTONIO TEXAS 78283-3966

December 11, 2025

Buddy Vargas, CPA, CIA, CFE
City Auditor
San Antonio, Texas

RE: Management's Corrective Action Plan for Audit of 311 Operations

The 311 Customer Service Department has reviewed the audit report and has developed the Corrective Action Plan below corresponding to the report recommendations.

Recommendation					
#	Description	Audit Report Page	Accept, Decline	Responsible Person's Name/Title	Completion Date
A	Call Service Representative Coaching The 311 Director ensure CSR coaching is performed as applicable and update the Performance Measures SOP to accurately document current metric goals.	6	Accept	Laura Davis, 311 Operations Manager	Pending December 31, 2025
Action plan: The Operations Manager is responsible for ensuring CSR coaching is completed on a monthly basis and as needed. The Director has put measures in place to ensure compliance. The FY 26 Performance Measures have been updated in the SOPs and will be signed by all Customer Service Representatives by December 31, 2025.					
B	Inaccurate Aging Reports <i>Service Level Agreements</i> The 311 Director correct the SLAs within CRM that were identified to be inaccurate and develop controls to periodically review SLAs to ensure accuracy within CRM. <i>System Integration</i>	7	Accept	Paula Stallcup, 311 Director	March 31, 2026

Audit of 311 Customer Service
311 Operations

Recommendation					
#	Description	Audit Report Page	Accept, Decline	Responsible Person's Name/Title	Completion Date
	The 311 Director in collaboration with ITSD, develop procedures to verify integration of service requests between CRM and backend systems. Additionally, evaluate current Chameleon cases and close out in CRM as applicable.				
	Action plan: 311 will develop a Standard Operating Procedure (SOP) for review of Service Level Agreements (SLA) with departments to include validation of SLA's in the 311 system. This review will be completed on an annual basis. The SOP and review of all SLAs for respective service request types with departments will be completed by March 31, 2026. In 2024 ITSD developed a dashboard based on Six Sigma techniques to log and track people, process, and technology issues that contribute to inconsistencies in the data between CRM and the respective backend systems. Issues are prioritized according to impact and ITSD teams work with 311 and Department staff to address the root cause of the issues. 311 will work with ITSD to formalize the process to review and address cases to ensure the systems (311 system and backend systems) are kept in sync. This Standard Operating Procedure will be completed by February 1, 2026.				
C	Reclassified/Reassigned Service Requests The 311 Director ensure all outstanding requests are reclassified/reassigned. In addition, establish controls to ensure any future reclass/reassign service requests are recreated timely.	9	Accept	Laura Davis, 311 Operations Manager	December 31, 2025
	Action plan: The 311 Manager has met with 311 Supervisors and Specialists to ensure they are following the process as outlined in our Standard Operating Procedure. The Manager will also be reviewing their workload on a weekly basis to ensure timely processing of said requests.				

Audit of 311 Customer Service
311 Operations

Recommendation					
#	Description	Audit Report Page	Accept, Decline	Responsible Person's Name/Title	Completion Date
D	System Access The 311 Director: • Delimit access for inappropriate users within Calabrio and CRM, • Establish a periodic access review over Calabrio, and • Modify the semi-annual reviews over CRM to ensure access is delimited accordingly.	9	Accept	Paula Stallcup, 311 Director	January 31, 2026
Action plan: 311 has been completing a review of COSA staff that has access to the 311 Verint system twice a year, per our Standard Operating Procedure (SOP). This SOP will be updated to include the review of Calabrio (audio recording system) to ensure appropriate access is provided to those required and remove access for others.					

We are committed to addressing the recommendations in the audit report and the plan of action presented above.

Sincerely,


 Paula Stallcup
 Director
 311 Customer Service

12-15-25
 Date


 Jeff Coyle
 Assistant City Manager
 City Manager's Office

12-17-25
 Date