

ALAMEDA-CONTRA COSTA TRANSIT DISTRICT



STAFF REPORT

MEETING DATE: 10/22/2025

Staff Report No. 25-470

TO: AC Transit Board of Directors
FROM: Salvador Llamas, General Manager/Chief Executive Officer
SUBJECT: Review of Board Policy 421 - Customer Contact Policy

ACTION ITEM

AGENDA PLANNING REQUEST: ☐

RECOMMENDED ACTION(S):

Consider approving minor amendments to Board Policy 421 - Customer Contact Policy.

Staff Contact:
Claudia Burgos, Executive Director of External Affairs and Customer Experience

STRATEGIC IMPORTANCE:

Goal - Strong Public and Policymaker Support
Initiative - Service Quality

The proposed policy amendments reaffirm and strengthen the District's commitment to transparent and effective public engagement practices. Additionally, this policy outlines to the public how their concerns, complaints, and suggestions can be shared with the District and how they will be handled.

BUDGETARY/FISCAL IMPACT:

There is no budgetary or fiscal impact associated with this report.

BACKGROUND/RATIONALE:

Board Policy 421 - Customer Contact Policy was last revised in October 2020 to expand and codify the process for handling customer feedback. The proposed amendments include minor updates to the customer contact process to align with the implementation of a new Customer Relationship Management tool (CRM), which will replace the current database (CusRel) which is scheduled to be decommissioned by early 2026.

A new key feature of the CRM will be the automatic generation of an acknowledgment and ticket number when feedback is entered into the system. Customers who submit feedback via the AC Transit Customer Call Center, AC Transit website, or mobile app will immediately receive acknowledgement along with a ticket number. Customers who submit feedback in person will receive acknowledgment and a ticket number when their comments are entered into the system by staff. Customers who send their comments via mail will receive acknowledgment via postcard, if no other contact information is provided. All feedback entered into the CRM is subject to review and investigation, regardless of whether contact information is provided, or a formal

response is requested. Investigating all feedback received ensures that customer input contributes to service improvements and an enhanced customer experience, even when direct follow up with the customer is not possible or requested.

Staff has reviewed the content of the current policy and are recommending the following modifications:

Section III. Definitions - This section added a new definition for CRM to support the implementation of the new system. Additionally, definitions that are duplicative or unnecessary for specific mention are proposed for removal.

Section IV. Policy - This section was amended to update the term “riders” to align with current District nomenclature, “customers”. **Section IV. A.2.** was changed to clearly distinguish the concepts of Acknowledgment and Response Time, which were combined into one idea in the previous policy. The new **Section IV. A.3.** was added to highlight the District’s policy on response time to customers’ feedback. Lastly, **Section IV. C. Reporting** added that Customer Services also provides ad hoc reporting district wide.

These changes strengthen AC Transit’s feedback process by improving consistency, transparency, and accountability. They also align with industry standards, demonstrating the District’s commitment to ensuring that customer feedback is heard and considered. Research into peer transit agencies nationwide shows that few maintain a formal policy defining a timeline for responding to customer feedback. The District distinguishes itself by committing to acknowledge feedback promptly, and when applicable, to provide a substantive response within 5 business days.

Recognizing that any new system requires a substantial learning period, the Customer Services team is open to reviewing and potentially revising the policy in 2026, after the implementation of the CRM, to ensure the board policy continues to reflect the operational needs and processes.

ADVANTAGES/DISADVANTAGES:

Having a current Customer Contact policy ensures that staff and procedures are aligned with District goals, is reflective of current technology, and that customers are provided with appropriate and timely responses.

ALTERNATIVES ANALYSIS:

An alternative option would be to leave the policy in its current form. This approach, however, would not reflect practices resulting from the implementation of the new CRM.

PRIOR RELEVANT BOARD ACTION/POLICIES:

Board Policy 421- Customer Contact Policy
Staff Report 20-310 - Board Policy 421-Customer Contact Policy

ATTACHMENTS:

1. Redline of Board Policy 421-Customer Contact Policy

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Approved/Reviewed by:

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Claudia Burgos, Executive Director of External Affairs and Customer Experience